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Communication strategy for Continente online store: **improving the Ecommerce experience**



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Abstract

Nowadays, convenience is a key dimension in the grocery retail sector. Comparing with other grocery brands, Continente is not capable of providing the same level of physical proximity to consumers. Therefore, it should make an effort to communicate that it is able to offer convenience through the Continente online store, taking advantage of the long term potential of online channels in the grocery market. New technologies have been gaining an increasing role in people's lives and Continente has the right conditions to seize the opportunities afforded by this reality through its online sales service. In this instance, the communication strategy developed in this work aims to improve Continente online store's functionality, communication and the promotion of its service.

Key words: Convenience; online grocery; communication; Continente.

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1 Introduction

This project was developed in partnership with *FUEL communication agency*¹, and aims to find new solutions for Continente's communication strategy. With this purpose, following the Creative Business Idea (CBI) model², the grocery market, the consumers profile and the Continente brand were analyzed and briefly described. In order to complement this diagnostic, a market research was conducted, seeking to study the consumer's perceptions and behaviors in detail.

Continente was the first Hypermarket chain in Portugal (since 1985) and is today the market leader brand in the grocery retail sector. However, it is important to identify new challenges and opportunities, considering the present economic context. Portugal is going through a significant recession period, with negative impacts on all sectors of economic activity. The projections for 2012³ point to a sharp demand contraction and unemployment increase, as the panorama is not expected to improve. Additionally, Continente's main competitor, Pingo Doce, has been growing significantly in recent years⁴. In the current scenario, Continente has to follow a proactive communication strategy, in order to maintain its leader position and continue to grow. Therefore, given the conclusions from CBI analysis and looking to the future on the grocery sector, the communication solutions suggested were defined towards the improvement and promotion of a specific Continente service – **Continente online sales**.

2 Situation analysis

2.1 Category momentum

In Portugal, the grocery market generates a sales volume of around 10 billion per year⁵ and is currently dominated by two local players: Continente (Sonae Group) and Pingo

¹ Portuguese communication company, Fuel Publicidade Lda.

² Refer to appendix 1 in booklet 2 for further information concerning CBI methodology.






³ Refer to <http://www.bportugal.pt/pt>.

⁴ Refer to http://www.aped.pt/Media/content/313_1_G.pdf.

⁵ Refer to http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publicacoes.

Doce (Jerónimo Martins Group). The other main players competing in the market are Intermarché, Lidl, Minipreço and Auchan group¹.

Table 1 – Grocery market main players (Portugal)²

Retail brands	Market share	1º sem. 2011, YoY growth	Nº of stores	Private label	Online sales	Discount card
	25,40%	1,20%	176	✓	✓	✓
	18,90%	0,80%	362	✓	-	-
	9,50%	-	188	✓	-	✓
	9,10%	0,10%	227	✓	-	-
	7,00%	-0,10%	524	✓	-	✓
	6,30%	-0,30%	32	✓	✓	✓

In what regards the grocery sector's business results, we observe that the sales volume has already dropped between 1 and 2% in the second semester of 2011³, as a direct consequence of the Portuguese economic context. In some market categories the sales drop exceeds 10%⁴.

In general, high variations in disposable income do not cause high variations in total food spending, whereas the main changes are observed in consumers' purchase behaviors and decisions concerning the allocation of spending between different brands and products. The main factors influencing purchase decisions among grocery brands are **price, quality and convenience**⁵. Price and quality have always played such a key role as demand factors since most grocery products are essential goods. In turn, “convenience” is a dimension that has been gaining significance over the years, reflecting consumers' needs to save time and money.

¹ Refer to table 1 for information regarding the main players in the grocery market, page 5.

² Refer to table sources: 1) Companies' websites; 2) http://www.aped.pt/Media/content/313_1_G.pdf; 3) http://economico.sapo.pt/noticias/continente-reforca-lideranca-de-mercado-face-ao-pingo-doce_125168.html.

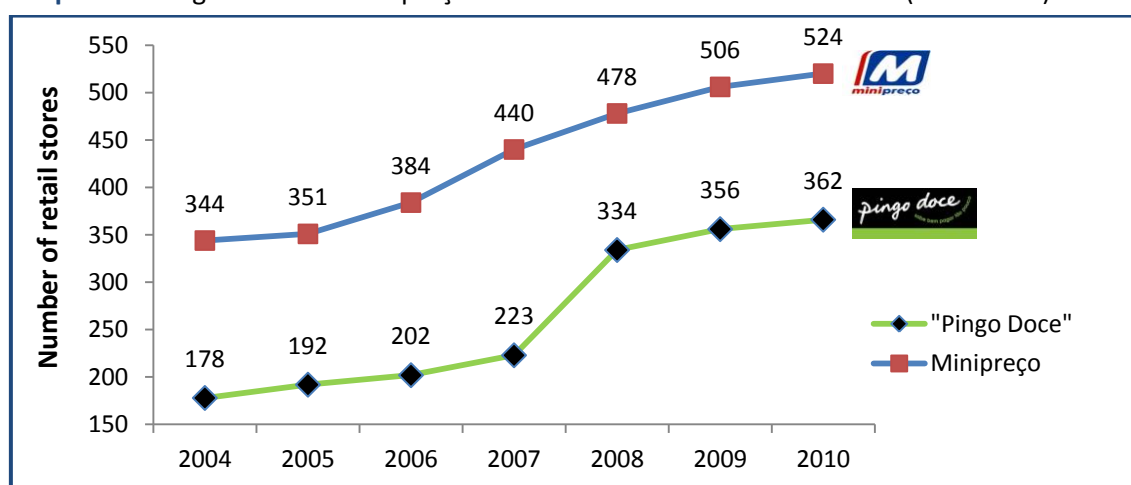
³ Refer to http://www.jornaldenegocios.pt/home.php?template=SHOWNEWS_V2&id=523651.

⁴ These numbers are even more serious considering the low elastic demand normally faced by the sector.

⁵ Refer to appendix 2 in Booklet 2 for a presentation of first survey data analysis - The survey's results helped to confirm these three factors as the most relevant for consumer's grocery choices.

One of the most relevant **trends**¹ that can be identified in the grocery market is associated with the increasing importance of **convenience**. In recent years, several grocery brands have expanded their retail chains considerably, in order to enhance their proximity to consumers. Seeking to attain the “**walking distance advantage**”, Pingo Doce and Minipreço, as the clearest examples of this trend², have opened a large number of grocery stores in residential areas.

Graphic 1 – Pingo Doce and Minipreço evolution in number of retail stores (2004-2010)



Regarding the **communication** strategies in the sector, TV is the number one media³ channel, and we observe that advertising is mainly **focused** on the **price dimension**. Following this pattern, the different grocery brands claim to have better prices and promotions than the competition, whereas almost every brand signature is related with this aspect⁴. The two main players in the market, Continente and Pingo Doce, are among the biggest Portuguese private investors in advertisement⁵.

The main **opportunities** in the sector⁵ are associated with **online sales** service, as we live in an increasingly technological society⁶, where more and more people are used to

¹ Refer to the appendix 3 in Booklet 2 for a presentation of the grocery market trends.

² Refer to figure 1 in Page 6.

³ Refer to <http://publishing.mediagate.pt/MediaGate/Radiogate/04Primavera2011/?Page=14>.

⁴ Signatures: Continente – “quem faz as contas conta com o Continente”; “Pingo Doce – “sabe bem pagar tão pouco”; Minipreço – “só paga mais quem quer”; Lidl – “aqui a qualidade é mais barata”.

⁵ Refer to appendix 4 in booklet 2 for a presentation of Continente’s SWOT analysis.

⁶ Refer to appendix 5 in booklet 2 for information relatively to internet data in Portugal.

Ecommerce, while the major **threats**¹ are related with changes in consumer behaviours due to the **economic crisis**.

2.2 Prosumer momentum

In order to define the Prosumer momentum I used secondary data provided by FUEL and data from the market research. Regarding FUEL findings, nowadays consumers depict a more rational behavior, as a direct consequence of the changes in their purchasing power. This **higher rationality** means that consumers will be increasingly concerned with overall savings while shopping. Therefore, price will continue to play a major role in purchasing decisions (higher price sensitivity), and **new ways of saving** will gain an increasing importance. Consumers are trying more and more to avoid “impulse buys” in their purchases (**resist temptation**), and additionally, people like to spend more time at their homes (**cocooning**).

Considering the results from the market research, we observed that 89%² of the survey respondents “value” or “highly value” the **convenience** factor, while choosing among grocery brands, (35% and 54%, respectively). Grocery consumers tend to buy from Continente with less frequency (63%² of the respondents buys from Continente fortnightly or monthly), and purchase a higher volume of goods (36%² spend 50 euro’s or more), when comparing with Pingo Doce³. On the subject of how consumers use the media in this market, 45%² of the respondents selected TV as the primary mean where information about Continente comes from. On the other hand, one may argue that people have already reached some stage of **adaptation relatively** to grocery **advertising**, as 61,8%⁴ stated that Continente advertising has low or no influence on their purchase decisions. Given the large number of times that similar commercials are repeated,

¹ Refer to appendix 4 in booklet 2 for a presentation of Continente’s SWOT analysis.

² Refer to appendix 2 in booklet 2 for a presentation of the first survey data analysis.

³ Refer to appendix 2 in booklet 2 for more information regarding Continente and Pingo Doce consumers’ habits.

⁴ This percentage refers to the survey respondents who indicated Continente as “favorite brand”.

consumers tend to pay less attention to their messages, which reduces the brand's power to influence purchase decisions through advertising.

Finally, concerning several products categories presented in the survey¹, consumers gave a higher importance to **fresh products** (53%)² and **national products** (31%)².

2.3 Brand momentum

Continente is a grocery retail brand that was implemented in 1985 and belongs to Sonae Group, one of the most important private groups in Portugal. Today, **Continente** is the **market leader** brand in the grocery sector, being recognized by its **quality** (23%)³ and ability to provide a **wide** and diversified products **portfolio** (37%)³, at very competitive prices. In the first semester of 2011, Continente attained a market share of 25,4%, a year on year 1, 2% rise⁴, maintaining its leader position. In the same period, the sales of the food grew 3% and represented a sales volume of 1,56 billion⁵. Recently (March, 2011), Sonae merged its grocery retail brands Continente and Modelo, whereas it operates today only through Continente's brand⁶. The 110 old Modelo stores⁷ acquired the name of *Continente Modelo* and the 26 Modelo Bonjour⁸ are now operating under the name of *Continente Bom Dia*⁹. Thereby, today Continente is present in the grocery sector through a retail chain of 176 grocery stores.

Considering Continente **strengths**¹⁰ and the purpose of this project, it is worth emphasizing that being considered a **reliable brand**, Continente benefits from a greater

¹ Refer to appendix 2 in booklet 2 for a presentation of the first survey data analysis.

² Represent the percentage of the respondents who considered these categories "very important".

³ Quality -23%- and variety -37%- were the two characteristics more associated with Continente brand by the survey respondents.

⁴ Refer to http://economico.sapo.pt/noticias/continente-reforca-lideranca-de-mercado-face-ao-pingo-doce_125168.html.

⁵ Refer to http://www.bestfranchising.pt/ver_noticia.aspx?idnoticia=1451

⁶ Refer to <http://www.anilact.pt/component/content/article/3702-sonae-gasta-dez-milhoes-na-fusao-continente-modelo>.

⁷ Medium dimension (2000m²); <http://www.sonae.pt/gca/index.php?id=66>.

⁸ Small dimension (800m²); <http://www.sonae.pt/gca/index.php?id=66>

⁹ These new stores were added up to the 40 Continente hypermarkets.

¹⁰ Refer to appendix 4 in booklet 2 for a presentation of Continente's SWOT analysis.

ability to implement a successful communication campaign. Moreover, among all advertisers, Continente has the higher advertising recall level¹. Another important strength is its **presence in online channels**, since it differentiates them from most of their competitors in the grocery market. Regarding **weaknesses**², I identified convenience as the major Continente disadvantage since, comparing with most of its competitors, Continente is not able to provide the same level of physical proximity to consumers. Continente's lower proximity generally implies a **lower convenience**³, meaning that people have to spend more time and effort to get to a Continente store. On the other hand, its main competitor, Pingo Doce, has more than twice the number of grocery stores, with convenience being the dimension which consumers more associate to Pingo Doce brand (43%)⁴.

2.4 Situation analysis conclusion

After analyzing the market, the consumers, and the brand, the next CBI model step is to understand the interactions between these three areas, in order to decide the right issue to address in the communication strategy. Considering grocery brand's effort to be close to its customers, the high value given by consumers to convenience, and Continente disadvantage associated with this dimension, in my understanding, an increase in Continente's convenience level constitutes an imperative to **enhance the brand's relevance**. On the other hand, the Portuguese economic context is affecting consumers purchase decisions (e.g. higher rationality, temptation resistance), whereas Continente could promote new ways of saving in order to **maintain its advantage** relative to competitors. Finally, as mentioned above, online grocery emerges as a huge **opportunity** in this market.

¹ Refer to <http://www.marktest.com/wap/a/n/id~195c.aspx>.

² Refer to appendix 4 in booklet 2 for a presentation of Continente's SWOT analysis

³ Refer to [http://www.idosi.org/wasj/wasj12\(SSTE\)/10.pdf](http://www.idosi.org/wasj/wasj12(SSTE)/10.pdf).

⁴ Only 16% of the survey respondents associate Continente to convenience.

I believe that Continente online store will enable the brand to take advantage of these three challenges simultaneously, seeing that grocery **online sales arise** as an efficient **solution** to mitigate Continente's clear disadvantage regarding convenience, **by narrowing the proximity gap to consumers**. Using Continente online, customers can quickly order their grocery products from anywhere and receive it at home. On the other hand, Continente could promote **new ways of saving** through its online platform and take advantage from the **large potential** of this service.

Additionally, to strengthen CBI results, I conducted Continente's **TOWS analysis**¹, which reinforced the decision to focus the strategy in Continente online sales service, since, as we can see in table 2², online grocery appears in two Tows' axes.

Table 2 – TOWS analysis

TOWS analysis	Opportunities: <ul style="list-style-type: none"> • National Products increasing importance • Online sales service • Cocooning 	Threats: <ul style="list-style-type: none"> • Pingo Doce expansion • Consumers higher price sensitivity
Strengths: <ul style="list-style-type: none"> • “Clube dos Produtores” • Continente online store • Trusted brand • Quality and variety of its portfolio 	National products promotion	Explore the Online grocery business
Weaknesses: <ul style="list-style-type: none"> • Convenience • Hypermarkets dimension 	Explore the Online grocery business	Hypermarket guidance system

¹ Refer to Table 2 for presentation of Continente's TOWS analysis, page 10.

² TOWS analysis is a tool that aims to identify how Continente can use its strengths to take advantage of the market opportunities and mitigate threats, and how to overcome the brand's weaknesses.

3 - Communication Strategy

*“The bottom line is that **online grocery** represents a largely **unrealized opportunity**, but grocers must work to build awareness and establish the value proposition (...)”¹.*

Today, Continente is able to provide more than 20.000 grocery products online and has around 300.000 registered² online clients. However, this service could be further explored through some improvements and a communication effort to support it. Considering the outcome of the situation analysis, online grocery emerges as a potential tool that could enable Continente to maintain its market leader position and continue a path of sustainable growth. Therefore, the solutions suggested for Continente’s communication strategy were designed towards the goal of **promoting** the online sales service and **improving the ecommerce experience**. All these solutions will help to overcome Continente main disadvantage – convenience - and seek to **increase the online business stream**, by reaching new consumers from competitors. To this end, a second market research was addressed³, with a focus on online grocery.

3.1 Further reflection on online grocery business

Among Continente’s main competitors, only **Jumbo** currently provides this kind of service. However, I also took **El Corte ingles**⁴ into account, since the Spanish brand it’s also a player in grocery online business in Portugal. Regarding the features of the online service provided by the three brands, there are no significant differences⁵. Nevertheless, being able to offer grocery products through online channels provides a **unique ability to interact** and engage **with customers**, enhancing the brand’s capacity to deliver a more personalized service, and gives to Continente a strong **competitive advantage** in a

¹ Refer to <http://blog.nielsen.com/nielsenwire/consumer/opportunities-abound-for-online-grocers/>

² Refer to

http://tek.sapo.pt/noticias/internet/negocio_online_do_continente_corre_sobre_carr_1227062.html

³ The second survey is more focused on Continente online potential costumers - 93% of the respondents use internet “frequently” or “very frequently” and 60% are within the 24-44 age group.

⁴ El Corte Ingles has special characteristics, whereas it operates only through five supermarkets (“Supercor”) and focuses its strategy differentiated portfolio (high quality and gourmet products).

⁵ Refer to appendix 7 booklet 2 relative to Portuguese online grocer’s characteristics.

field that is likely to be crucial in the near future (E-commerce sales are expected to grow 78% in Europe until 2016)¹. Grocery shopping through online channels is growing rapidly and it's expected to gain even more relevance in the coming years². Across Europe and the U.S. there are already a large number of grocery brands adopting online channels in their business models. After analyzing several online grocers' websites and strategies³, I considered **Tesco**, the world's larger online grocery retailer, as the **benchmark** brand⁴. Tesco accomplished very strong results through Ecommerce, and therefore I analyzed some of its online strategies as "best practice" examples³.

In **Portugal**, consumers rely more and more on online shopping, as the number of people using **e-commerce services** has been **increasing** substantially **in recent years**⁵. The current advances in technology will drive the future of online grocery shopping, while the generation of teenagers which has grown up using Internet, is now making its own grocery choices and will gradually represent a bigger consumer group⁵.

3.2 Advantages for consumers

Considering today's consumer profile and the trends previously identified, it is apparent that online grocery shopping may offer significant advantages. Many people enjoy the grocery shopping experience, and the possibility to see and touch the products displayed is something they value⁶. Continente retail stores already satisfy efficiently the needs of these clients. On the other hand, there are also a large number of consumers that privilege **convenience** and **practicality** in grocery shopping. Ecommerce has emerged as an effective answer to these consumers' requirements, as people can buy their

¹ Refer to <http://trendwatching.com/pt/trends/etailevolution/?easycommerce>.

² Refer to http://www.netsonda.pt/not_noticias_detail.php?aID=147 - online grocery is one of the fastest growing areas in e-commerce.

³ Sainsbury; ASDA; Waitrose; Morrison's; Peapod; Gateway; Maingrocery; Freshdirect; Carrefour; Metro; Schwan's; Marks Spencer; Oscado; Brithiscornershop; Mybrands; Appie; Netgrocer; MySupermarket.

⁴ Refer to appendix 6 in booklet 2 for information regarding Tesco online strategy and accomplishments.

⁵ Refer to appendix 5 in booklet 2 for presentation relatively to internet data in Portugal - Ecommerce evidenced an average annual growth of 23% (2002-2010).

⁶ Refer to <http://www.investopedia.com/financial-edge/0711/10-Reasons-Why-Online-Grocery-Shopping-Is-Failing.aspx#axzz1wLc9UXHT>.

grocery products with a click of a button from any location. Additionally, online shopping is an optimal solution for consumers that like to spend more time at their homes (*Cocooning*), and want to avoid the social dimension of shopping. Moreover, home delivery of products purchased online is appealing to those for whom going out to supermarkets is difficult. That may be for a number of reasons, such as busy lifestyle, the lack of adequate or convenient transportation, and/or for those who consider the supermarket purchase experience annoying and a waste of time. Actually, **time saving**¹ is a key characteristic of the online sales service, as applications like “my last order” contribute to a faster purchase process². Furthermore, some consumers are prone to avoid things they dislike, such as parking the car, crowded supermarket corridors or long waiting lines to pay. Online shopping aims to be a simple and quick process that allows people to save time and **reduce stress**³.

This service has also advantages relative to **budget control**⁴ and **savings**. Besides potential savings related to transport costs, Continente online store enables a more **rational purchase process**⁵. In supermarket purchases consumers don't know exactly how much they are spending while choosing their grocery products, and as a result of choices by impulse or sudden price changes, they may be negatively surprised with the total value of their purchase. Through Continente online store a person has a clear perception about the total amount at any time during the purchase process, being able to **quickly re-evaluate and remove items before the check out**. This way, consumers are able to better manage their grocery costs¹. Buying online can also help consumers to **resist temptation**. The large variety of products displayed in supermarkets make it

¹ Refer to the paper “*The way to profitable Internet grocery retailing*”.

² “Allow a faster purchase process” was considered the main advantage of online grocery by 37% of the respondents from the second survey”.

³ Refer to http://www.ukom.uk.net/media/Online%20Grocery%20Shopping_A4Final.pdf.

⁴ Refer to http://blog.nielsen.com/nielsenwire/wp-content/uploads/2009/10/Nielsen-OnlineGroceryReport_909.pdf.

⁵ “Enable a more rational purchase” was the nº 2 advantage most chosen (32%) in the second survey.

difficult for consumers to purchase just what they need, as people's senses, namely vision and smell, receive higher stimulus, creating extra incentives for "impulse buys".

3.3 Target groups

From all grocery consumers who value online service advantages mentioned in the previous section, I identified the target clients for Continente online store service. They should be **frequent internet users**¹, since people who never or rarely uses the internet, such as older people, are unlikely to change their grocery purchase habits to an online website. Moreover, Continente online should focus on **younger generations**, namely people from age groups between 18-24, 25-34 and 35-44 years old², which are generally more used to new technologies in their lives. Within this broader group, three different targets should be taken into account concerning the communication strategy:

- 1) **Jumbo and El Corte ingles online clients**– consumers that already purchase grocery products online and those to whom Continente wants to create "brand switching".
- 2) **Consumers who buy their groceries offline on any of the competitors** - consumers that currently buy their groceries through Continente competitors and for some reasons they do not purchase grocery products online. On the other hand, most of these consumers buy other types of products online (e.g. books, travel tickets)³. This target group is clearly the one with higher importance, since it represents a much bigger group comparing with the previous.
- 3) **Continente offline clients** – as consequence of the online service improvements and promotion, clients from Continente's current customer base may start to buy more online to the detriment of supermarkets purchases. Attracting these consumers is not a strategic goal. Nevertheless, as explained later, this group has to be considered.

¹ Refer to appendix 5 in booklet 2 for information relatively to Internet data in Portugal.

² Age groups with higher internet access rates (excluding people under 18).

³ 71% of the second survey respondents buy other products online occasionally (61%) or frequently (10%).

3.4 Online grocery main barriers

Bearing in mind the different targets groups, Continente online service barriers were defined according to the results from the second market research¹. The main reasons that lead consumers not to buy their grocery products online are the following:

- **Confidence relatively to the service** – Consumers that don't buy grocery products through online channels, depict a lack of trust of the service, namely relative to the selection process and quality of fresh products² (Fruits, vegetables e.g.). 38%³ of the survey respondents selected this factor as the main barrier to online grocery purchases.
- **Delivery and return issues** – People display concerns regarding other offline aspects of the service. Some consumers are skeptical about return policies, dislike delivery time windows⁴ and/or consider shipping costs too high⁵. “Shipping costs” was the third factor most chosen (19%)³ among online grocery barriers in the survey.
- **Online store functionality** – Online grocer's websites have to be user friendly, applying an intuitive and practical approach. The online purchase experience is intended to be simple and quick. Otherwise, if it is considered confusing and time consuming, people tend to be less willing to use the online store, which become a significant barrier. The convenience benefits provided by the online purchase process may significantly decrease due to a weak webpage interface⁶, whereas 31%³ of the respondents consider “counterintuitive websites” the major reason not to buy online.

Concerning **payment** procedures, which may represent a barrier, consumers don't need to have access to a credit card to benefit from Continente online service⁷. By allowing

¹ The results were complemented with literature on the subject.

² Refer to http://blog.nielsen.com/nielsenwire/wp-content/uploads/2009/10/NielsenOnlineGroceryReport_909.pdf; <http://trendwatching.com/pt/trends/etailevolution/?easyccommerce>.

³ Refer to appendix 8 in booklet 2 for more information relatively to the second survey results.

⁴ Refer to http://www.iadis.net/dl/final_uploads/200507L029.pdf.

⁵ Refer to <http://blog.nielsen.com/nielsenwire/consumer/opportunities-abound-for-online-grocers/>.

⁶ Refer to [http://www.idosi.org/wasj/wasj12\(SSTE\)/10.pdf](http://www.idosi.org/wasj/wasj12(SSTE)/10.pdf).

⁷ Refer to appendix 7 in booklet 2 for a presentation of the Portuguese online grocers characteristics.

different forms of payment, Continente can reach a broader consumer group and overcome the skepticism of some people regarding the security of internet payments¹.

The barriers described above are associated with the factors that generally lead grocery consumers not to buy online. In order to increase the online customer base, by attracting offline consumers from competitors, these are the obstacles where Continent should focus on. On the other hand, there could be an important issue, related to the third group identified in the previous section, which would need to be taken into account:

- **Value loss on the actual costumer base** – The fact that buying online allows consumers to make quick and more rational purchases may represent a setback for Continente, if actual customers start to buy lower value purchases through the online store, compared with what they normally spend in Continente brick and mortal stores.

Therefore, the online strategy has to find solutions to promote a similar hypermarket shopping experience on Continente online store, for this specific target.

Finally, in order to reach the competitors online consumers, Continente has to differentiate its service, since all mentioned barriers do not apply to those consumers who already buy grocery products online.

4. Implementation

The communication strategy's main challenge is to attract **offline customers from competitors** through Continente online store. Therefore, most of the solutions² suggested were designed considering the barriers associated with consumers that do not buy their grocery products online. On the other hand, all the solutions will help Continente to differentiate its service from the other Portuguese online grocers and to promote brand switching. Finally, some of the solutions presented seek to minimize the effect of lower value purchases by Continente's current client base through the online

¹ Refer to <http://trendwatching.com/pt/trends/etailevolution/?easycommerce>.

² Refer to table 2 in page 25.

channel. Moreover, it's reasonable to assume that the potential gains from new online consumers would substantially overcome the possible value loss from Continente's actual customer base.

In order to achieve an **efficient strategy**, Continente has to **respond to the existent barriers**, improving the online and offline features of the service, and create solutions that seek to **generate incentives** and **increase awareness**. Accordingly, the proposals were divided in five areas: increase awareness; promotions; new online store features; offline improvements; and Smartphone's & tablets apps.

4.1 Increase awareness

Interactive ads¹: Today, TV offers innovative communication opportunities through new interactive formats and advertising experiences. Continente online could explore MEO interactive ads², where consumers would be able to add products to their online lists or order them³, during Continente TV commercials. This revolutionary option would take advantage of TV's huge communication power, allowing not only to draw consumer's attention, but also providing them the ability to choose Continente's products while watching TV.

MEO Kanal: *MEO Kanal* (channels where the contents are defined by MEO users) would be a link between Continente online store and the interactive ads⁴. Additionally, this platform would enable consumers to see Continente commercials, novelties, online promotions and campaigns available, and consult their online product lists.

Advertising: As previously referred, Continente invests strongly in advertising. Having this in mind, some of these resources could be directed towards online sales service. It's

¹ Continente was one of the first brands in Portugal to try Meo interactive ads with a Pediastra online commercial.

² Portugal Telecom group, Portuguese communication company, already offers the possibility of provide a transactional service through its channels (*Meo Kanal*), <http://kanal.meo.pt/como-funciona>.

³ In the case of the online special packs and the weekly promotional baskets (presented in the next section) for example, people would be able to actually order them directly through their TV.

⁴ When a person is watching a commercial and chooses the interactive option, he is directed to Continente *Meo Kanal* where, by introducing its password, he is able to add the products to its online list.

crucial to increase awareness onto the service, explaining its new features and ensuring that the potential consumers realize all the advantages provided by the Continente online store. Therefore, the communication strategy has to include a broader advertising effort, focused on a commercial that would appear on TV, radio and some strategic websites. These channels have to be chosen according to the target group preferences¹ and the **advertising message's** main goal would be to explain that **Continente online** store enables grocery consumers to **save time** and **money**.

In order to be able to create a higher impact, the commercial has to **apply a different tone** than the others grocery's commercials. As mentioned before, the advertising in the sector is heavily focused on price and there is little differentiation in this field among brands. Continente could try to use a more informal approach and humorous tone. In case of a partnership with Portugal Telecom, using *Meo Kanal* and its interactive ads, Continente could use *Gato Fedorento* (Portuguese comedians)² in the commercial, taking advantage of their media coverage and connecting with younger generations.

4.2 Promotions

Repeat purchasing is high within online channels³. Therefore, it is crucial to **create incentives** that seek to motivate consumers to try the service for the first time and boost people's interest around Continente's online store.

“See to believe”: The need to touch and feel some grocery products remains an obstacle to online shopping. Continente online has to win people's trust relatively to the products selection process, namely concerning fresh products, a category highly valued by grocery consumers. With this purpose, Continente could promote a campaign, “*See to*

¹ Refer to appendix 8 in booklet 2 for a presentation of the second survey results – most referred **TV channels**: FOX, SIC, RTP1; **Radio stations**: Radio Comercial, RFM, MegaFm; **Websites**: fnac.pt, Facebook.com, YouTube.com.

² Currently working in PT (MEO) advertising campaigns; <http://avidaeumpalco.com/tag/gato-fedorento/>.

³ Refer to http://www.ukom.uk.net/media/Online%20Grocery%20Shopping_A4Final.pdf - Nielsen study evidence that 73% of the UK consumers who buy groceries online come back for subsequent purchases.

believe”, offering products that consumers usually don’t trust, such as vegetables or fruits, when a customer buys a certain amount of other products in their first online purchase¹. This campaign would prove to consumers that fresh products reach their homes with quality and as requested, building a higher trust for future online purchases. In such a way, besides the indications system², consumers may actually confirm the freshness and quality of the products ordered, while benefiting from the campaign offerings.

Delivery fee campaigns: *first online experience* – offer the delivery fee in the first online purchase; *referral rewards* - on their first online purchase a person refers who had indicated him the service (through the user name, if that person is already a Continente online service user). Continente online customers would receive a free delivery for each reference³, motivating consumers, which are already users, to talk about the service to familiars and friends – “word of mouth” promotion.

Special packs: special online packs for specific occasions. These packs would be pre-defined lists of products, related to a particular program or meal, which consumers might quickly and easily order through Continente online store. For example, if a person decides to organize a barbecue lunch for his friends or a family dinner in his house, she would need to buy some extra grocery products for such occasions. Instead of having an additional travel to the supermarket, consumers could use Continente website, taking also advantage of promotional prices⁴. There are a lot of possibilities for these packs, which may go from thematic dinners (Mexican dinner, gourmet dinner e.g.) to programs such as watching a sport game at home with friends. These packs have to be displayed through appealing images related with the different programs, drawing people’s

¹ For each 20 euro’s of other products, the client could choose X kg of fruit and vegetables for example.

² Continente online store already provides a system where clients may specify how they want their products (fruit more or less mature e.g.).

³ The American online grocer MGD (mainegrocerydelivery), have implanted a similar strategy.

⁴ The special packs products would be cheaper compared with the same products bought individually.

attention to these opportunities. Moreover, if a consumer wants to purchase these packs, he would only have to: click over the image, confirm the products that belong to a specific pack, define for how many people the program is and order it. Meaning that some impulse buys could be also induced through this strategy.

Weekly promotional baskets: weekly promotional baskets, containing products from a given category, (e.g. cereals and cookies basket or a meat basket). Each week a different, online exclusive, basket would be promoted and available in limited number. The limited quantity generates an extra incentive, as these baskets represent an opportunity that only some consumers could benefit from, (consumers that buy their grocery products online are much more likely to pay attention to special offers and promotion opportunities than the average Internet user)¹. This strategy aims to enhance the client's involvement with the service and take advantage of their need for new ways of savings.

Online Loyalty program: a system where, according to the products amount purchased on Continente online, a customer would gradually receive points, which at a given level could be traded by money to spend at Continente online store, free deliveries or special offers. Given that some of the online sales service features help consumers to control better their budgets, Continente, on the other hand, has to implement measures to promote higher volume purchases².

Buy Portuguese: considering the increasing importance given by consumers to Portuguese goods³, national products could be promoted through Continente online store. Currently, there is nothing specific to emphasize national goods during the online purchase process. A possible communication solution would be an online store section where only Portuguese products would be available, whereas clients would be able to

¹ Refer to <http://blog.nielsen.com/nielsenwire/consumer/opportunities-abound-for-online-grocers/>

² Online grocers that use loyalty schemes: Tesco, <http://www.tesco.com/>; MGD, <https://mainegrocerydelivery.com/Index.aspx>; and Schwans, <http://www.schwans.com>

³ Refer to appendix 2 in booklet 2 for a presentation of the first survey data analysis.

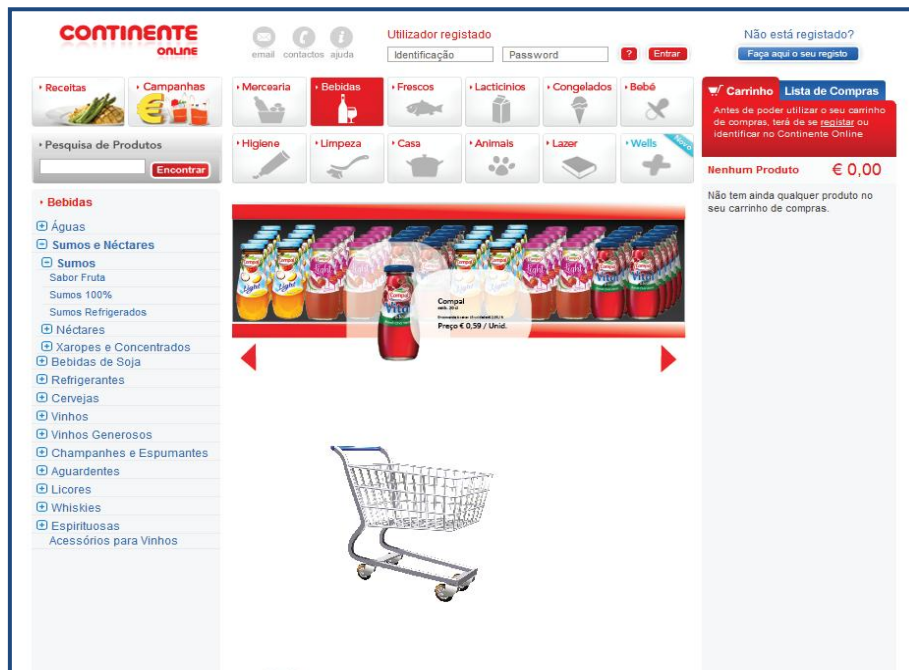
add these products directly to the trolley. This section could use appealing slogans related to the support given to our country, and images from Portuguese regions, showing the product's origins.

4.3 New online store features

This section seeks to **improve the online store's communication** and functionality, making the website more user-friendly and personalized.

Digital shelves: since consumers are not able to touch or see the products through online channels, images are fundamental to sustain online search and selection¹. For the product selection by category I suggest a horizontal shelf layout², simulating actual supermarket shelves. At first glance only the product images would be depicted, and by moving the computer mouse over an image the product is highlighted, displaying all its information. Then with just a click on the image the product would be added to the trolley³. As it already happens with the categories lists in Continente online store, these shelves could be organized by price, name, brand etc.

Figure 2 – digital shelves



¹ Refer to mfreeman@uow.edu.au.

² Refer to Figure 2 in page 21.

³ The nº of clicks with the left button = nº of items added, nº clicks with the left = nº of items removed.

Fresh products rankings: online clients would be able to see weekly freshness rankings (given by Continente's specialized staff) of the fresh products available online¹.

Multi search: the search engine is a tool used by online grocers to make the product selection process easier. Continente online store search engine could be improved. Currently, when a client types a product name, such as milk for example, the engine shows every product associated with the word milk (milk, condensed milk, etc). Instead, the respective shelf should appear, depicting only the different available possibilities of that specific product. The search engine could also allow other queries, such as to search by brand or for several products at the same time². Additionally, a person may define on their profile that he/she wants to see Portuguese products as first search results.

My Profile: an improvement of "my account" area in Continente online store, aiming to make it more visual, intuitive and informative. This section would be divided in 5 areas³: *loyalty program*, which shows customers how far they are from achieving rewards, considering the points accumulated in previous orders; *personalized suggestions*, that display customized suggestions according to typical client orders (data memory) and promotions available; *my lists*, where, besides "last purchase" and "my favorites" options, more specific category lists are presented (e.g. "beverages" "milk and yogurts") - these lists would be automatically generated according to customer usual purchases⁴; *purchase historic*, which shows graphs with categories where most of the money is spent, the most purchased products, percentage of national products bought, etc; *fast purchase*, where online clients may order the same list from its last purchase, just by clicking in the fast purchase trolley image and confirm three steps: same product list, same delivery schedule, same payment method.

¹ Refer to similar application on www.freshdirect.com.

² Tesco and ASDA multisearch option: www.tesco.com; www.ASDA.com.

³ Refer to appendix 9 in booklet 2, figure 4.

⁴ Additionally, by introducing Continente discount card number, a list is generated with the same products bought by the consumer in its last Continente physical store purchase;

Product associations: system of product associations where, during the product selection process, **pop-ups** appear to consumers, suggesting related products. These suggestions would follow the hypermarket placement, where some products are strategically placed close to others to incentive **impulse buys**. In order to have a higher effectiveness, the pop-ups should present only one or two suggestions at a time, and be displayed just when the customer chose certain products, preventing annoyance in the online shopping experience. This technique could be **applied in different levels** of intensity, considering different types of online consumers. Through *data mining* processes¹, Continente online store is able to design the consumers profile based on their historical purchase patterns, understanding which clients are more likely to perform impulse buys, and tailor the suggestions approach accordingly². This way, online customers that value a quick shopping and seek to resist temptation would be less “bothered” with suggestions. On the other hand, one of the purposes of this tool is to potentiate a similar purchase experience for the clients who already shop in Continente grocery stores³, taking simultaneously advantage of consumers who value considering several options and opportunities while shopping.

4.4 Offline improvements

Delivery schedule: Continente could promote cheaper deliveries for the most required schedules. The second survey evidenced the schedules of 20:00-23:00 on week days (48%) and 20:00-23:00 on weekends (29%) as the favorites to receive grocery orders⁴. Currently, the night period⁵ (20:00-22:30), is precisely the one with higher shipping

¹ Refer to

<http://www.anderson.ucla.edu/faculty/jason.frand/teacher/technologies/palace/datamining.htm>

² Clients have to be aware that their purchase information is being used by Continente - Portuguese law relatively to usage of personal data <http://www.cnpd.pt/bin/relacoes/comunicados/10-4-97.htm>.

³ In the registration process people could specify if they were Continente clients beforehand so this application could be applied more usefully to online users who were already Continente costumers.

⁴ Refer to appendix 8 in booklet 2 for a presentation of the second survey results.

⁵ Refer to appendix 5 in booklet 2 for information relatively to Portuguese online grocers characteristics.

costs. Consumers might be more likely to order online if they could receive their orders during a convenient schedule and benefit from lower delivery fees. In this sense, promote less expensive delivery periods according to consumers schedule preferences, would certainly help to overcome the barriers related with shipping costs and delivery time windows. On the other hand, having a higher number of orders in a given delivery schedule, Continente's average cost per delivery decreases in that period. Moreover, Continente could develop a system to optimize its deliveries (route system)¹.

Delivery opportunities: Special deliveries offered according to the number of orders booked for a given zone and schedule. Suppose Continente has already a large number of orders for a given delivery slot in Restelo (Lisbon region). A client that lives in that zone could benefit from a half price shipment opportunity, if he is willing to receive its products in that schedule. This system would be another way in which Continente could differentiate its online service and mitigate shipping costs issues.

Reserved delivery: Offer the possibility to book a regular delivery slot. If a client has a specific schedule where he wants to receive orders every time, they would be able to reserve a delivery slot, avoiding worries related with the schedules available, (e.g. receive the online store orders on Mondays at 21:00).

Check period policy: currently, Continente has a return system where the client may return any product during the delivery process and get a full refund. However, this procedure is inefficient, since in most cases by the time clients check their orders the delivery staff has already left. Continente should promote a *Check period policy*, where clients are encouraged by the delivery staff to verify if the products, especially the fresh products, are as ordered. This strategy would enhance consumers trust relatively to the return policy and to the online service process as a whole.

¹ Tesco has invested in software to optimize the delivery trucks travels.

4.5 Apps – Smartphone's and tablets.

Besides online grocery, Continente is also a pioneer in mobile technology¹. Since this type of applications is likely to gain a higher weight in grocery shopping in the future² and given the communication effort suggested for Continente online store, Continente could invest in new apps to complement its online service. For **Smart phones apps** I suggest two new apps: *my deliveries* - enables to cancel an order or amend the delivery schedule, depicting time slots available and delivery opportunities; *smart purchase* - depict personalized weekly suggestions that can be added to the consumer's online lists and show online the weekly baskets and special packs available. Additionally, this app allows consumers to easily order "my last purchase" list from the online store. Regarding **tablets**, Continente should promote an application that gives access to Continente online store, since these devices have the capacity to replicate Continente's online shopping experience, with the advantage that it **enhances** even more the **practicality** of the service, relying on the tablets portability³. Moreover, tablet's touch screens may turn the selection process more easy and pleasant.

Table 3 – solutions summary⁴

Solutions	Barrier 1 Trust	Barrier 2 Offline issues	Barrier 3 Websites	Barrier 4 Value loss	Promotion and incentives
Digital shelves			✓		
Freshness ranking	✓				
Multi search			✓		
My profile			✓		
Product associations				✓	

¹ Continente iPhones applications "Chef online" and "Mundo do Bebê".

² Refer to http://www.ukom.uk.net/media/Online%20Grocery%20Shopping_A4Final.pdf, the technology devices that support these applications are becoming increasingly common.

³ Consumers may search and select products, make their grocery lists and order them on the subway or on the bus for example.

⁴ **Barrier 1** – Lack of trust relatively to product selection.

Barrier 2 – Shipping costs, delivery time windows, return issues.

Barrier 3 – Counter intuitive websites

Barrier 4 – Value loss in Continente actual customer base.

Delivery schedules		✓			
Delivery opportunities		✓			✓
Reserved delivery		✓			
Check period	✓	✓			
Interactive ads					✓
Meo Kanal					✓
Advertising effort					✓
See to believe	✓				✓
Delivery fees		✓			✓
Special packs				✓	✓
Weakly baskets					✓
Loyalty schemes				✓	✓
Portuguese section					✓
Smartphone & tablets			✓		✓

5. Conclusion

Today, grocery brands need more and more to be close to people, since the **convenience** factor has become a key driver of consumer's decisions and behaviors on the grocery sector. On the other hand, **new technologies**, which have already a dominant role in other services, show evidence of huge potential in this market, representing a large **opportunity** for Continente. These were the **two main findings** from the **situation analysis**, carried out in the beginning of this project.

Therefore, the communication strategy was centered on **online grocery service**, which is able to provide a high convenience, as it enables consumers to save time and money. Moreover, the service is very appealing to younger generations, which will represent the largest consumer group in the near future. After identifying the main reasons why people don't buy their grocery products online, the solutions presented were defined accordingly, seeking to enhance consumer's motivation towards online grocery shopping and achieve a significant growth through this channel. Hopefully, by promoting and improving the service, Continente online store will be able to attract new offline costumers from competitors.

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A Work Project, presented as part of the requirements for the Award of a Masters Degree in Management from the Nova School of Business and Economics

Booklet 2

Communication strategy for Continente online store: improving the Ecommerce experience

Francisco Leão nº789

A Project carried out on the Marketing Field Lab – Communication Agency – with the supervision of:

Professor Luísa Agante

June 2012

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Appendix 1 – CBI model

The **CBI** (creative business idea) model was developed by Euro RSCG Worldwide¹, the largest unit of Havas, a world leader in communication (Euronext Paris: HAV.PA)².

This strategic approach aims to reach creative and efficient **communication solutions**, which would enable companies to attain sustainable growth paths. With this purpose, the CBI methodology aims to understand the main opportunities that should be exploited in a given market, defining a communication strategy accordingly. To this end, the model analyzes three dimensions: *Category*, *Prosumer* and *Brand*.

The **category momentum** studies the market, highlighting aspects such as: who are the main players; how they operate; which are the current opportunities and threats; which are the most relevant market trends; and how the communication strategies are performed in the sector.

The **prosumer momentum** analyzes which factors drive the consumer's decisions in a given market. This dimension of the model is crucial in order to understand the profile of our target group and how their characteristics and behaviors are expected to change in the near future.

Finally, the **brand's momentum** identifies how our brand is performing comparing with competitors and what differentiates it. The idea is to find out the brand main strengths and weaknesses, looking to the brand's heritage and realizing its competitive advantages for the future.

The final step in CBI approach is to understand the interactions between these three dimensions, in order to decide the right issue to address in our communication strategy.

¹ Refer to <http://www.eurorscg.com/flash/index.html#/Home?id=0>

² Refer to <http://www.havas.com/havas-dyn/en/introduction-introduction.1.html>

Appendix 2- Survey analysis results

First market research, N=145

Table 1 – Continente & Pingo Doce data



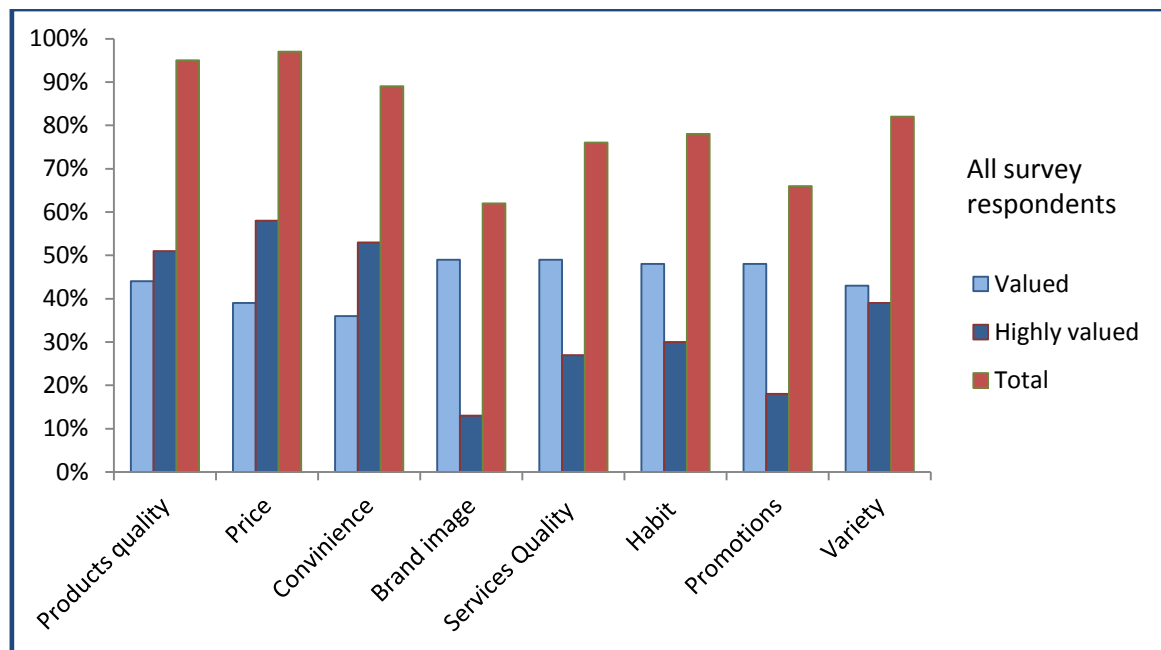
	Purchase frequency		Average amount purchased		Favourite grocery brand
	Once a week or more	Fortnightly or monthly	0-50 euro's	+50 euro's	
	27%	62%	67%	36%	34%
	62%	29%	84%	16%	40%

Table 2 – Grocery brand's associations

Grocery brands	Brand's associations				
	Quality	Variety	Low prices	Convenience	Promotions
Continente	23%	37%	8%	16%	16%
Pingo Doce	27%	5%	21%	43%	3%
Intermarché	5%	10%	39%	27%	18%
Lidl	5%	3%	69%	13%	8%
Minipreço	1%	1%	75%	13%	8%
Jumbo	26%	37%	11%	19%	6%

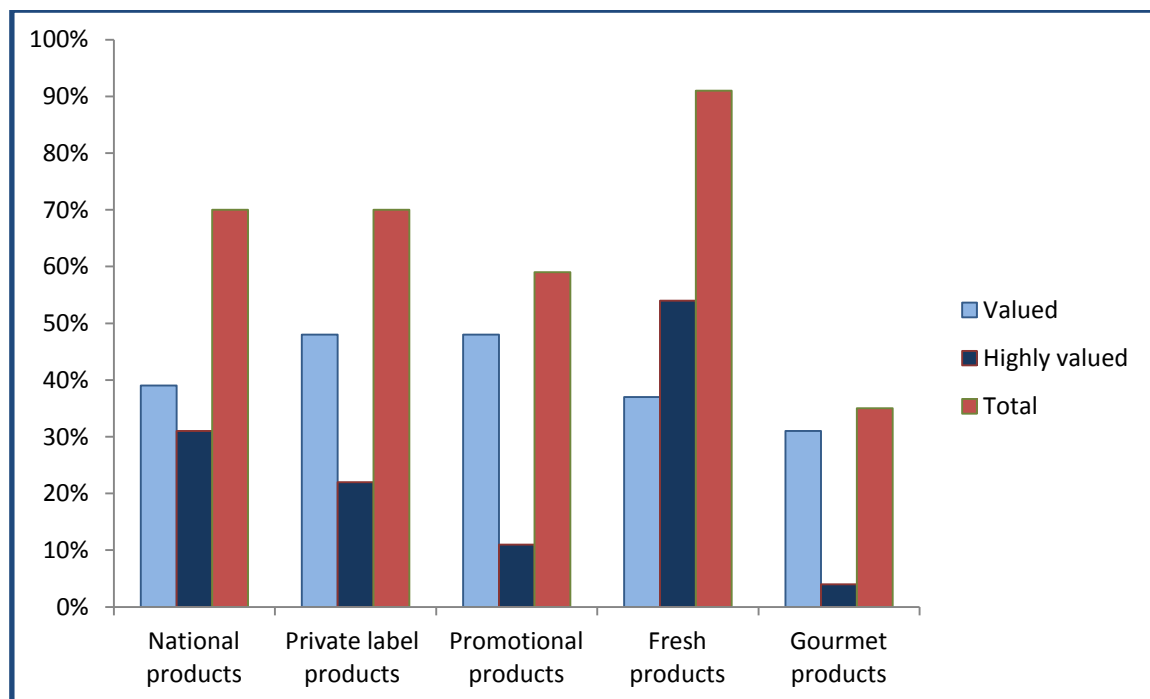
Graphic 1 – Factors affecting purchase decisions in the grocery market**Table 3** – Factors affecting purchase decisions in the grocery market

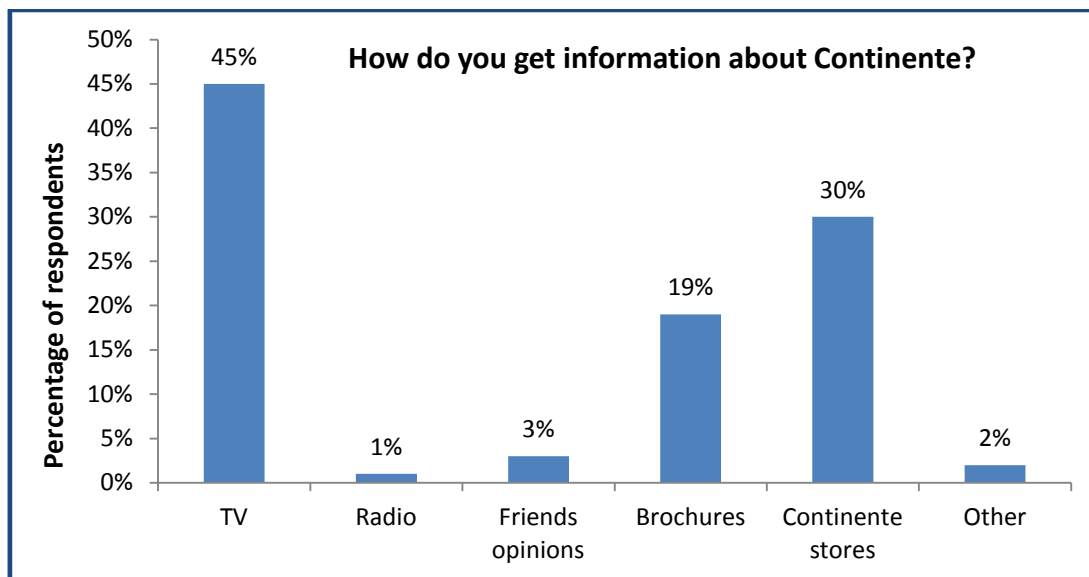
Percentages of respondents that “highly value” each factor.

Sub-Groups	Factors influencing decisions among grocery brands					
	Prices	Products Quality	Convenience	Habit	Brand image	Variety
Favorite supermarket brand Continente	59,68%*	48,39%	51,61%	22,58%	12,90%	41,94%
Favorite supermarket brand Pingo Doce	59,32%	52,54%	57,63%	27,12%	10,17%	25,42%
Favorite supermarket brand other than Continente	58,02%	53,09%	56,79%	34,57%	13,58%	35,80%
Age group 20-49	59,74%	38,96%	51,95%	25,97%	7,79%	31,17%
All respondents	58%	50%	53%	29%	13%	38%

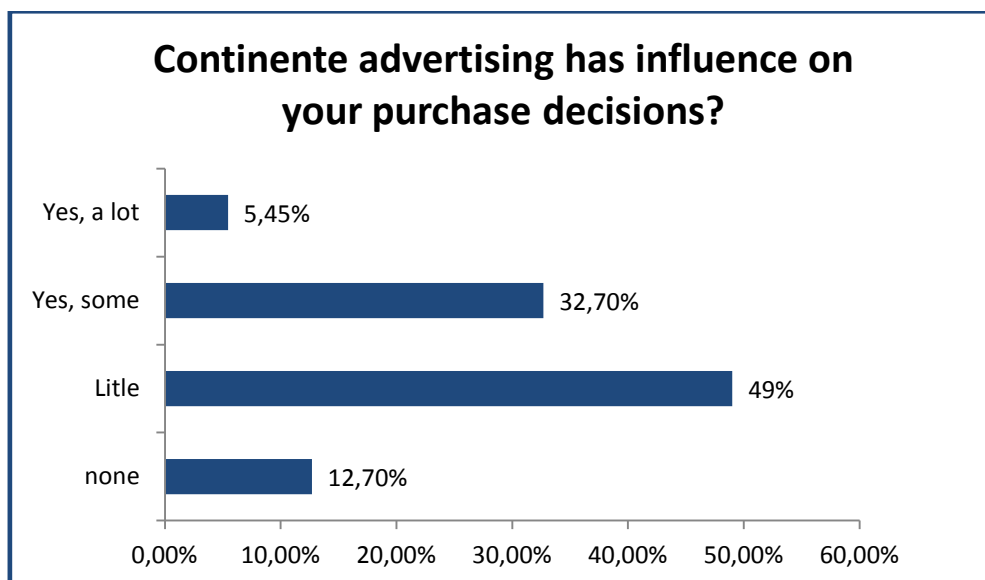
Table 4 – Product categories preferences

Products categories	Unimportant	Less important	Indifferent	Important	Very important
National products	2%	7%	21%	39%	31%
Fresh products	3%	1%	3%	38%	53%
Products gourmet	14%	28%	24%	30%	3%
Products in promotion	8%	18%	16%	48%	10%
Private label products	5%	8%	17%	48%	21%

Graphic 2 – Products categories preferences

Graphic 3 – Continente communication channels**Graphic 4 – Continente advertising**

These percentages refer to the survey respondents who choose Continente as “favorite brand”.



Appendix 3 – Market trends

<p>Increasing importance of Portuguese products</p> 	<p>The economic crisis that Portugal is passing through is generating new types of purchase incentives. Nowadays, consumers give an increasing importance to national products in their grocery purchases¹, whereas in these difficult times people show evidences of more patriotic behaviors in their consumption decisions.</p>
<p>Proximity</p> 	<p>This trend has being observed for several years but is more and more significant, since consumers started to increasingly privilege convenience in addition to quality and low prices¹. Pingo Doce and Minipreço, as the clear examples of this trend, have increased significantly their retail chain in the last years². Moreover, Continente and Pingo Doce have recently invested in a new business concept bearing in mind the changes in the consumers purchase habits. <i>Meu super</i> (Continente) and <i>Amanhecer</i> (Pingo Doce) are franchising strategies, through small neighborhood grocery stores, which also reflect this market trend, where the retail brands acknowledge the increasing importance of the convenience factor³.</p>
<p>Private labels</p> 	<p>Generally prices from private labels are far below from the branded products within the same category, being on average posted 30% below the leader brand⁴. In 2011, products from private labels already represented 25% of the Portuguese food market⁵. Consumers rely more and more on this type of products, not only due to their lower purchase power, but also because most of these labels are introduced by the big grocery groups, whereas consumer's evidence higher levels of trust on them (<i>umbrella effect</i>).</p>

¹ Refer to the appendix 2 for presentation of the first survey results.

² Refer to the case study – Mudança no sector alimentar: O Pingo Doce.

³ Refer to <http://www.marketeer.pt/2011/03/09/batalha-na-distribuicao/>

⁴ Refer to http://economico.sapo.pt/noticias/marcas-brancas-sao-30-mais-baratas_109432.html (DECO)

⁵ Refer to <http://www.portal-financeiro.com/artigo/o-mais-barato-cresce-o-consumo-de-marcas-brancas.html> (APED).

Appendix 4- Continente SWOT's analysis

Strengths	
Strong and positive brand image	This Continente's characteristic is very important in the communication field, since people tend to trust more in promotional campaigns and TV commercials from brands that they already know and perceived as reliable. According to a Marketest reputation study, among grocery retail brands operating in Portugal, Continente depicts the higher levels relatively to trust transmitted to consumers and reputation ¹ . Furthermore, Continente received in 2012 "Marca de confiança" award for the eight in a row ² .
Quality and variety of its portfolio	Quality ³ is a key factor influencing consumers' grocery purchase decisions. Continente it's able to provide high quality in their product portfolio and also a wide variety within each category, reaching a broader scope of consumer's tastes and preferences. Additionally, Continente it's capable to offer this quality at very competitive process.
Involvement with national producers ("Clube dos produtores")	Through "Clube dos produtores" Continente improves the relations with national producers, creating synergies for both sides. Moreover, this engagement may generate extra incentives towards Continente purchases, since the brand promotes more Portuguese goods and contribute to the development of the country economy. In 2011 Continente purchases from national producers increase 5, 5%, reaching the total value of 176 million euro's ⁴ .
Continente private label	Realizing that there are some grocery products where price is the primary factor influencing purchase decisions, and relying on its dimension and capacity, Continent offers a wide range of product from their own private label. Nowadays, these products gain a higher importance considering the consumer higher price sensitivity.
Continente online	Continente it's able to provide its grocery portfolio through online channel, having this service already well established. Continente was the first brand in the Portuguese grocery market to invest on online platforms, and among Continente main competitors only also Jumbo provides this type of service.
Discount card	This loyalty tool gains even a higher value, considering the actual economic context and the consumer's need of new ways of saving. Continente discount card accumulates money for future Continente purchases based on the value of current purchases (1%), generates daily discounts in several products and creates other type of savings through Continente partners.

¹ Refer to <http://www.marktest.com/wap/a/n/id~1805.aspx>

² Refer to <http://www.marcasdeconfianca.seleccoes.pt/Marcas/Continente.aspx>

³ Refer to appendix for the results survey data analyze

⁴ Refer to <http://www.hipersuper.pt/2012/03/13/sonae-compra-176-milhoes-de-euros-a-produtores-nacionais/>

Weaknesses	
Convenience	As a Hypermarket chain, Continente has clearly a disadvantage concerning convenience. The concept of a hypermarket privileges variety on the detriment of proximity. This way, Continente propose to offer to its clients every grocery item they may need, through a lower number of retail stores. On the other hand, the physical proximity to consumers is smaller. Even after Continente and Modelo merger, the majority of the consumers don't have a Continente store near its house, when compared with some Continente's competitors, namely Pingo Doce.
Unpractical stores	Continente hypermarkets are huge retail stores with large corridors that provide a wide number of different brands within each product category. For some consumers this kind of grocery stores is not practical, as they lose more time to find and pick the products they need. Therefore, Continente's hypermarket dimension can be in some cases a disadvantage, especially if we think that today consumers go to supermarkets with a higher frequency (smaller purchases) and seek to avoid temptation ("impulse buys") while shopping.

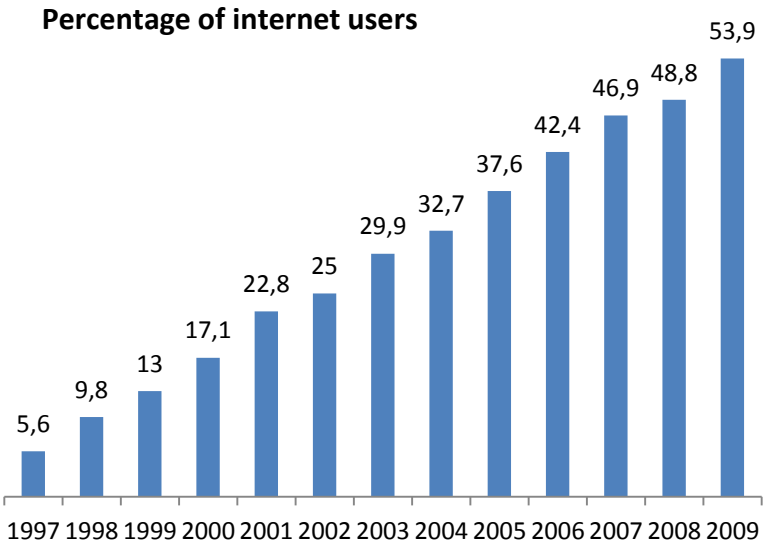
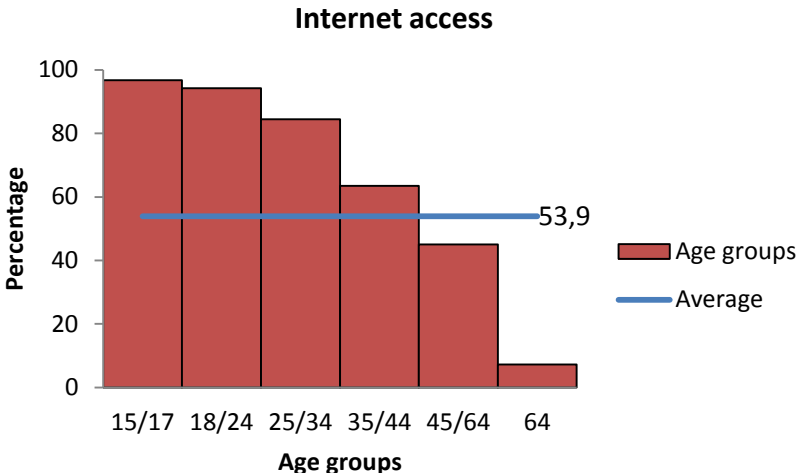
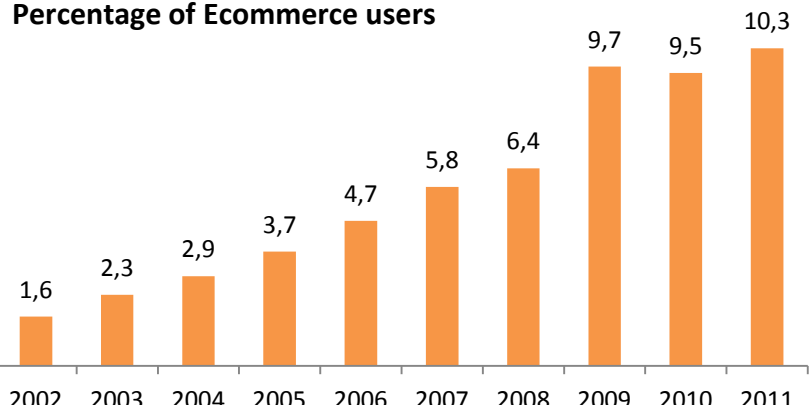
Opportunities	
Online shopping	Nowadays people are increasingly used to new technologies in their daily lives whereas internet sales services are more and more reliable. Continente has already more than 300 million consumers ¹ registered, but this service has huge potential as it should be deeply explored.
National products increasing importance	Considering the economic situation, many consumers try to buy a larger number of Portuguese products, believing that through this behavior they are helping its country's economy. Therefore, being a Portuguese brand and selling a large number of Portuguese goods could help to generate important extra incentives relatively to people's consumption intentions.
Cocooning	Home delivery services could gain a bigger relevance in near future, considering that people will tend to spend more time in their homes (<i>Cocooning</i>). Continente could take advantage of this phenomenon, relying on its online service.

¹http://tek.sapo.pt/noticias/internet/compras_de_supermercado_ganham_espaco_online_1137487.html

Threats	
Economic crisis	The present economic context in Portugal could affect considerably the consumer's behaviors. Therefore, in the current situation, <i>discount</i> supermarkets (e.g. Lidl and Minipreço) can take advantage of the consumers higher price sensitiveness.
Pingo Doce expansion	Pingo Doce, Continente main competitor, has been experiencing high growth rates in recent years ¹ , both in terms of sales volume and market share. This growth was achieved through a redefinition of its strategy ("prices always low") and, more recently, strong communication campaigns. Pingo Doce had invested in a strong communication campaign since 2009, mainly through TV commercials, evidencing a more informal and familiar approach and using a theme song that created some controversy in the beginning but end up generating a huge impact.
Higher purchase frequency	The importance given to the supermarket's proximity may be also related with consumer's higher purchase frequency. Today consumers buy grocery their grocery products more accordingly to the daily/weekly needs and income availability, on the detriment of bimonthly or monthly purchases. This higher purchase frequency can represent a threat to Continente, since the convenience aspect gains a greater importance.

¹ Refer to http://www.aped.pt/Media/content/313_1_G.pdf

Appendix 5 – Internet data (Portugal)


<p>55% of the Portuguese population, between 15-74 years old, has access to the internet¹</p>	<p>Percentage of internet users</p>  <table border="1"> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>1997</td><td>5,6</td></tr> <tr><td>1998</td><td>9,8</td></tr> <tr><td>1999</td><td>13</td></tr> <tr><td>2000</td><td>17,1</td></tr> <tr><td>2001</td><td>22,8</td></tr> <tr><td>2002</td><td>25</td></tr> <tr><td>2003</td><td>29,9</td></tr> <tr><td>2004</td><td>32,7</td></tr> <tr><td>2005</td><td>37,6</td></tr> <tr><td>2006</td><td>42,4</td></tr> <tr><td>2007</td><td>46,9</td></tr> <tr><td>2008</td><td>48,8</td></tr> <tr><td>2009</td><td>53,9</td></tr> </tbody> </table>	Year	Percentage	1997	5,6	1998	9,8	1999	13	2000	17,1	2001	22,8	2002	25	2003	29,9	2004	32,7	2005	37,6	2006	42,4	2007	46,9	2008	48,8	2009	53,9
Year	Percentage																												
1997	5,6																												
1998	9,8																												
1999	13																												
2000	17,1																												
2001	22,8																												
2002	25																												
2003	29,9																												
2004	32,7																												
2005	37,6																												
2006	42,4																												
2007	46,9																												
2008	48,8																												
2009	53,9																												
<p>People from the age groups of 18-24(94%), 25-34(84%) and 35-44(63%) depict higher percentages¹, which are also normally people more familiar with new technologies and e-commerce.</p>	<p>Internet access</p>  <table border="1"> <thead> <tr> <th>Age groups</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>15/17</td><td>~96</td></tr> <tr><td>18/24</td><td>~94</td></tr> <tr><td>25/34</td><td>~84</td></tr> <tr><td>35/44</td><td>~63</td></tr> <tr><td>45/64</td><td>~45</td></tr> <tr><td>64</td><td>~8</td></tr> <tr><td>Average</td><td>53,9</td></tr> </tbody> </table>	Age groups	Percentage	15/17	~96	18/24	~94	25/34	~84	35/44	~63	45/64	~45	64	~8	Average	53,9												
Age groups	Percentage																												
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35/44	~63																												
45/64	~45																												
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Average	53,9																												
<p>The nº of Portuguese consumers that buy online evidence an average annual growth of 23% between 2002 and 2011². Moreover online grocery is one of the fastest growing areas in e-commerce³.</p>	<p>Percentage of Ecommerce users</p>  <table border="1"> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>2002</td><td>1,6</td></tr> <tr><td>2003</td><td>2,3</td></tr> <tr><td>2004</td><td>2,9</td></tr> <tr><td>2005</td><td>3,7</td></tr> <tr><td>2006</td><td>4,7</td></tr> <tr><td>2007</td><td>5,8</td></tr> <tr><td>2008</td><td>6,4</td></tr> <tr><td>2009</td><td>9,7</td></tr> <tr><td>2010</td><td>9,5</td></tr> <tr><td>2011</td><td>10,3</td></tr> </tbody> </table>	Year	Percentage	2002	1,6	2003	2,3	2004	2,9	2005	3,7	2006	4,7	2007	5,8	2008	6,4	2009	9,7	2010	9,5	2011	10,3						
Year	Percentage																												
2002	1,6																												
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2004	2,9																												
2005	3,7																												
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¹ Refer to <http://pplware.sapo.pt/informacao/45-milhoes-de-utilizadores-na-internet-em-portugal/>

² Refer to http://tek.sapo.pt/noticias/internet/55_dos_portugueses_navegam_na_internet_1199458.html

³ Refer to http://www.netsonda.pt/not_noticias_detail.php?aID=147

Appendix 6 – Tesco, the benchmark brand

Tesco	
Achievements through online channels:	<ul style="list-style-type: none"> • Tesco is the world's biggest online grocer, with an online business around 2,5 billion a year¹ (considering worldwide sales). • Online food sales increased 35% in 2007 and 49% in 2008, following a huge IT investment². • Tesco achieved high loyalty rates among Tesco online consumers³. • Its leadership on online shopping has been attracting new customer from the other big 3 UK grocers (ASDA, Sainsbury and Morrison's)⁴.
Service characteristics	<p>Route software -Tesco has extended the capacity of its vans and acquired some very clever routing software that highlight the optimum delivery route for its drivers.</p> <p>Loyalty schemes – online customers receive benefits according their involvement level with the brand.</p> <p>Bagless delivery - greener delivery option.</p> <p>Email marketing.</p> <p>Follow-up communication strategy - triggered after different events in the customer lifecycle: “Logged-on”, “Developing”, “Established”, “Logged-off” (the aim here is to win back a customer).</p>
Online special features	<p>Promotions alert - highlight all deals that a client have missed.</p> <p>Multisearch option – search for several items at once.</p> <p>Holiday pre-order – option to place an order up to three weeks in advance.</p> <p>Product life logo - shows how long the product is likely to be at its best</p> <p>Text alert service - contact the clients the day before the delivery is due, to let him know the latest time he can make changes.</p> <p>Section with all promotions available – all special offers in one place.</p> <p>Recipes ideas – cooking tips and videos.</p> <p>Substitutions never cost more - always offer an alternative if an item you've ordered isn't available. If it's more expensive we'll only charge you the price of the item you ordered.</p>
Promotions	<p>Buy one get one – free offers in some products.</p> <p>Clubcard – collect 1 point for every 1£ spent online. These points can be traded for Vouchers (... e.g.).</p> <p>Different product promotions every week</p>

Sources: Tesco website


¹ Refer to <http://internetretailing.net/2010/04/online-profits-up-as-tesco-delivers-more-than-a-billion-items/>


² Refer to <http://www.computerworlduk.com/news/outsourcing/8542/tesco-online-profits-rocket-49/>

³ Refer to <http://www.davechaffey.com/E-commerce-Internet-marketing-case-studies/Tesco.com-case-study>


⁴ Refer to <http://www.slideshare.net/evolutioninsights/online-food-grocery-the-shopper-perspective-sample-extract>

Appendix 7 - Portuguese Online grocers

Continente online	
Online features	<p>Search by category – The available products are divided by categories (beverages, fresh products, e.g.).</p> <p>Fast purchase option – Consumers are able to select the same products list from their last online order.</p> <p>Product lists – Lists of Favorites and Top products selected by each client.</p> <p>Suggestions – List of product suggestions.</p> <p>Indications – Clients may type specific indications, saying how they want a given product (e.g. fruit more or less mature).</p> <p>Recipes – Section explaining how to prepare a large number of different recipes.</p> <p>Campaigns – section depicting online ongoing campaigns.</p> <p>Search engine – Show every products associated with a given word written in the search engine.</p>
Delivery conditions	<p>Shipping costs:</p> <ul style="list-style-type: none"> • Orders less than 200 euro's: Delivery fees between 3 and 10 euro's from Mondays till Saturdays; 8 euro's on Sundays (not all delivery slots available). • Between 200 and 250 euros: Delivery fees between 1.5 and 5 euro's from Mondays till Saturdays; 4 euro's on Sundays (not all delivery slots are available). • Over 250 euro's: Free shipping. <p>Delivery schedule – Every day from 8:30 a.m. to 10:30 p.m. Slots available: 08:30-18:00; 09:00-10:30; 10:30-12:30; 12:00-14:30; 14:00-16:30; 18:30-20:30; 20:00-22:30; 21:00-22:30.</p> <p>More expensive schedules: 18:00-20:30 – 8 euro's; 21:00-22:30 – 10 euro's.</p> <p>Less expensive schedules: weakly days, 08:30-18:00 – 3 euro's.</p>
Payment	<p>Online – Continente payment card, Credit card or bank transfer.</p> <p>On delivery – Continente payment card, multibank and check.</p>

Jumbo online	
Online features	<p>Search by category - the available products are divided by categories (beverages, fresh products, e.g.).</p> <p>Opportunities – Products suggestions.</p> <p>Leaflets - Depict current promotions.</p> <p>Auchan products – Section with the Auchan private label products.</p> <p>Indications – Clients may type specific indications in the different items, explaining how they want a given product (e.g. fruit more or less mature).</p>

	Search engine - Show every products associated with a given word written in the search engine.
Delivery conditions	Shipping costs: <ul style="list-style-type: none"> • 6 euro's for deliveries until 6 p.m. every day except Sundays. • 8 euro's for after 6 p.m. deliveries and Sunday deliveries. Delivery schedule – everyday from 10 am to 23 pm. Clients can order accordingly to the slots available and their residential area. Orders until 11 a.m. can be delivered on the same day.
Payment	Online – Jumbo credit card (allowing payment in installments), Visa or MasterCard. On delivery – any type of payment card that is compatible with a TPA terminal.

El Corte Ingles	
Online features	Search by category - the available products are divided by categories (beverages, fresh products, e.g.). Fast purchase option - Multi search engine that allows consumers to search for several products at same time. Promotions – depict the promotions available within each product category. News – Show the most recent online supermarket offers. Last order – Clients can check its last order and add the same products to the trolley. Personal Lists – Possibility to create different personal lists of products. Clube gourmet section – website section only with gourmet products. Search engine – Allows clients to search a specific product, a category or brand.
Delivery conditions	Shipping costs - Fix delivery fee of six Euros. Delivery schedule – Depend on the client residential area and on the time in which the order is made.
Payment	Online – El Corte Ingles credit card, credit card Visa, American express and MasterCard. On delivery – cash.

Source: Brand's websites

Appendix 8 – Second survey analysis results

Second market research (N=140)

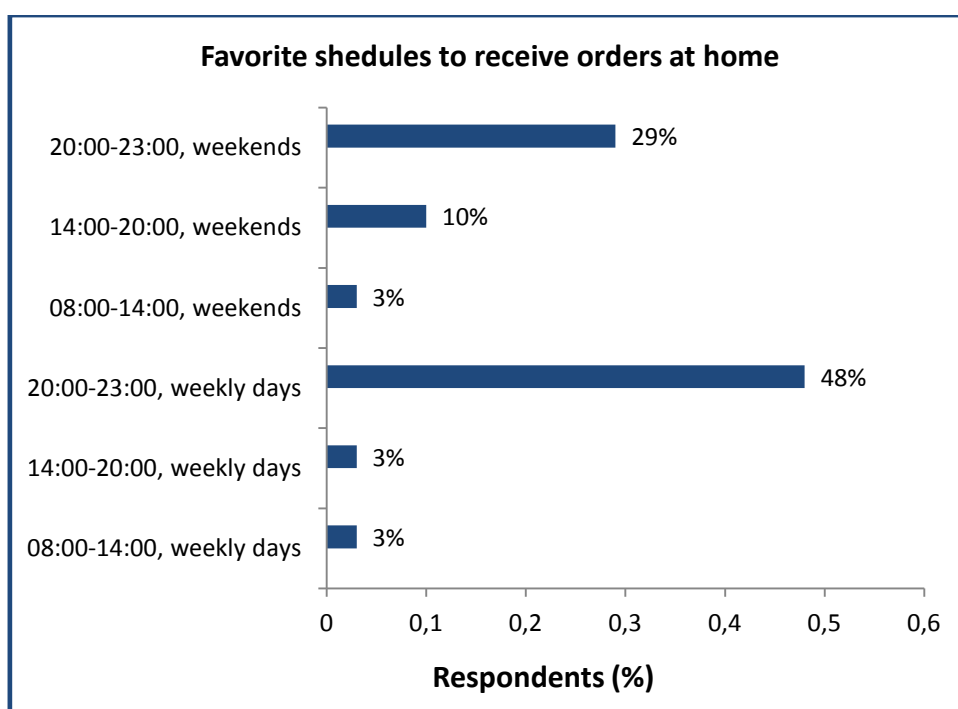
Table 1 – Online grocery main barriers

People who do not buy grocery products online. Sub groups	Online grocery barriers				
	Counterintuitive website	Distrust relatively to the selection process.	Shipping costs	Delivery time windows	Return policy
Consumers who are not Continente clients (a)	40,00%	35,56%	17,78%	4,44%	2,22%
Internet frequent Users (b)	33,33%	36,46%	18,75%	6,25%	5,21%
Age group 25-45 (c)	33,33%	36,51%	22,22%	6,35%	1,59%
a+b+c	46,67%	26,67%	16,67%	6,67%	3,33%
All respondents	31,37%	38,23%	18,62	6,86%	4,91%

Table 2 – Online grocery advantages

Sub groups	Online grocery advantages				
	Saving in transport costs	Service more personalized	Quicker purchase process	More rational purchase	Higher attention to promotions
Consumers who are not Continente clients	13,21%	13,21%	45,28%	24,53%	3,77%
Internet frequent	15,15%	11,36%	37,12%	31,06%	5,30%

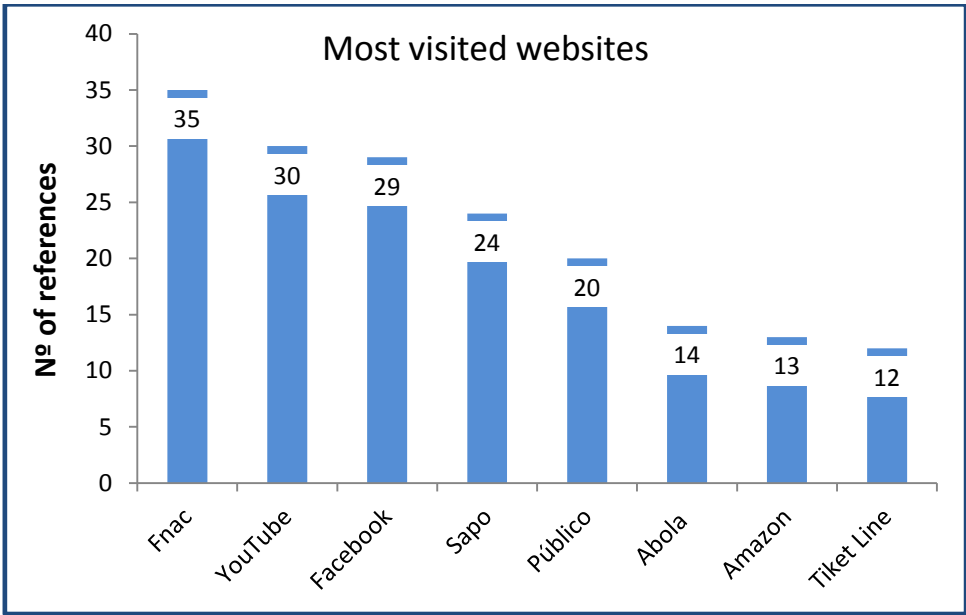
Users					
Age group 25-45	16,05%	13,58%	38,27%	24,69%	7,41%
a+b+c	17,65%	17,65%	35,29%	23,53%	5,88%
All respondents	15%	10%	37%	31%	5%

Graphic 1 – Delivery Schedules**Table 3 – Communication channels**

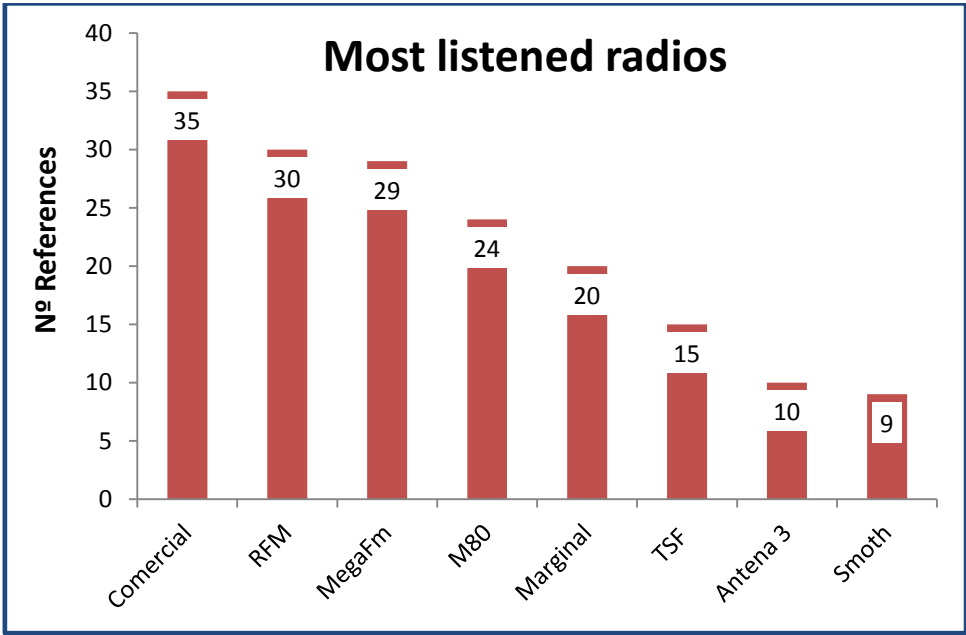
Communication channels	The most mentioned	Most frequent Schedules
TV	<ul style="list-style-type: none"> FOX SIC RTP1 	20:00-24:00 (93%)*
Radio	<ul style="list-style-type: none"> Radio Comercial RFM 	08:00-12:00 (69%)*
Websites	<ul style="list-style-type: none"> FNAC Facebook YouTube 	20:00-24:00 (45%)*

*percentage of the respondents that choose these schedules

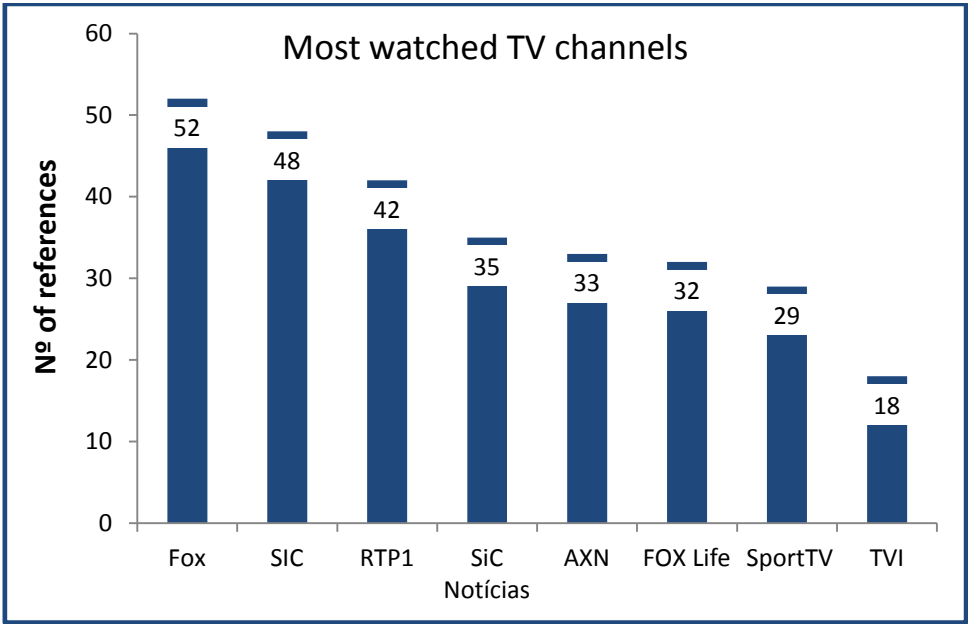
Graphic 2 – Most visited websites



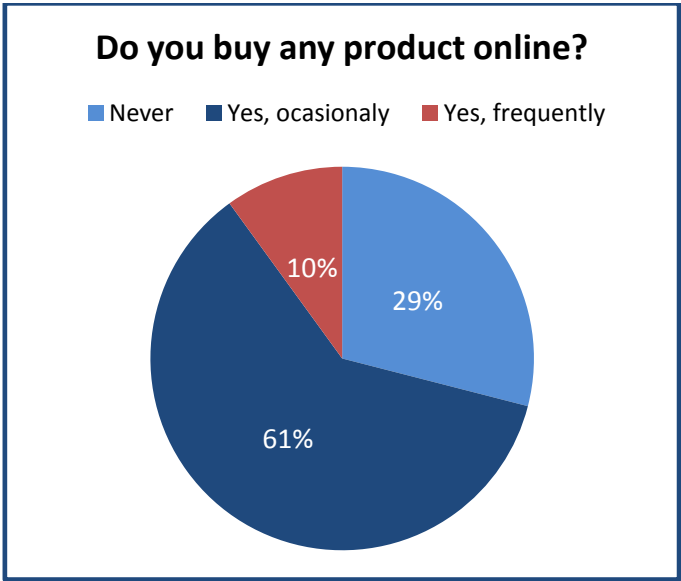
Graphic 3 – Most listened radios



Graphic 4 – Most watched TV's



Graphic 5 - Ecommerce



Appendix 9 – Online store new features

Figure 1 - Search by category current option

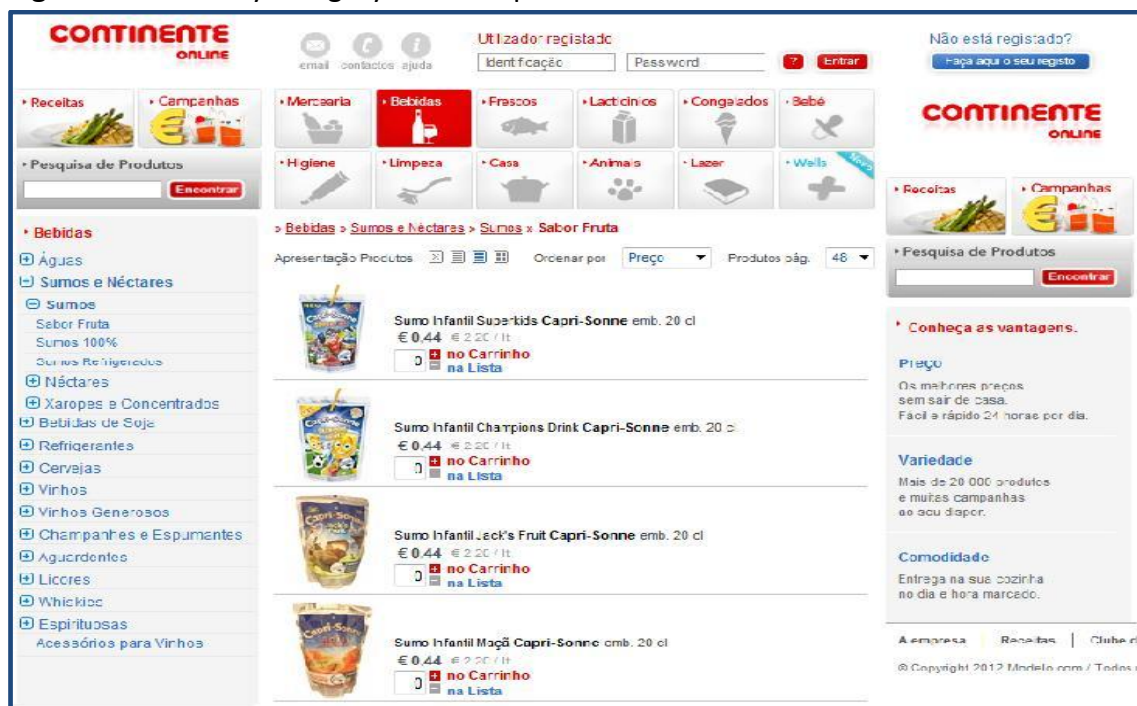


Figure 2– Digital shelves

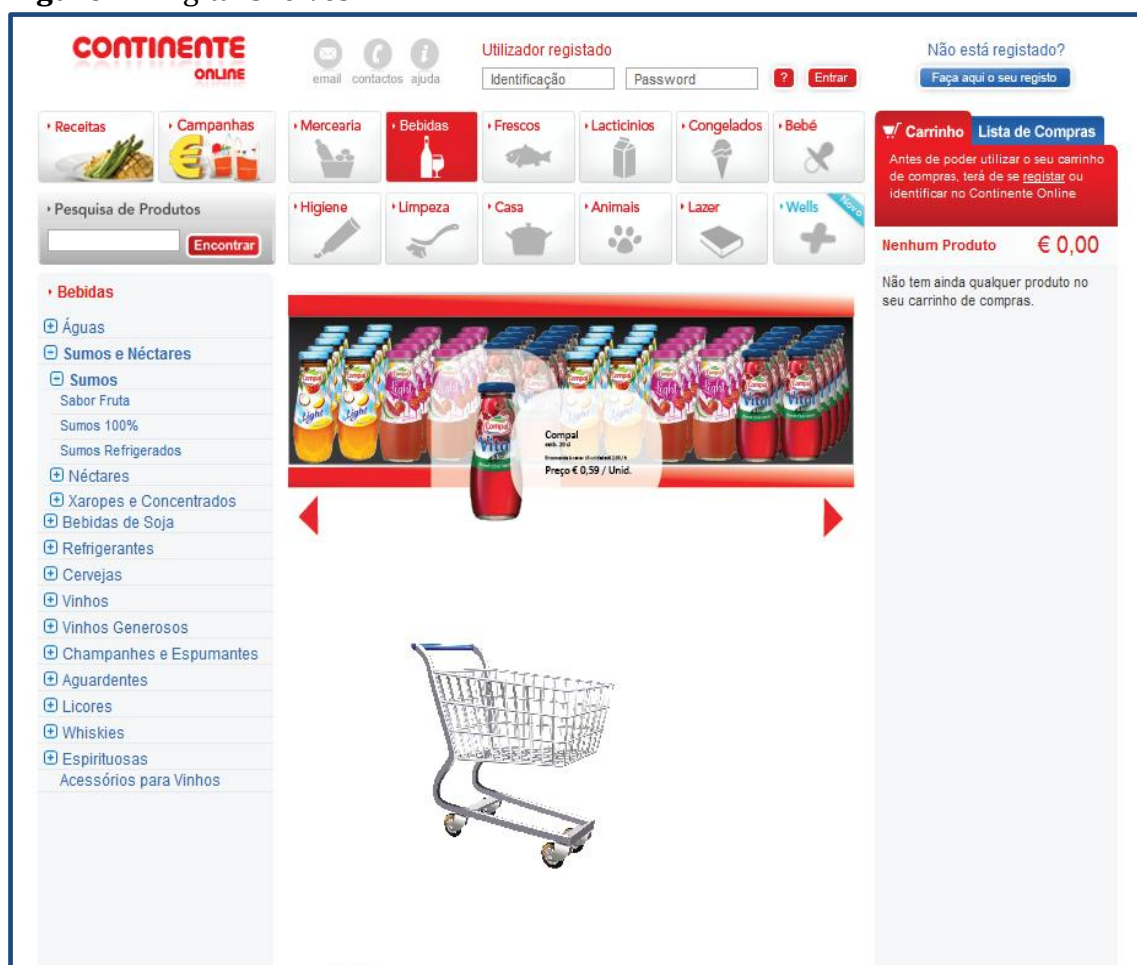


Figure 3 – My account current layout

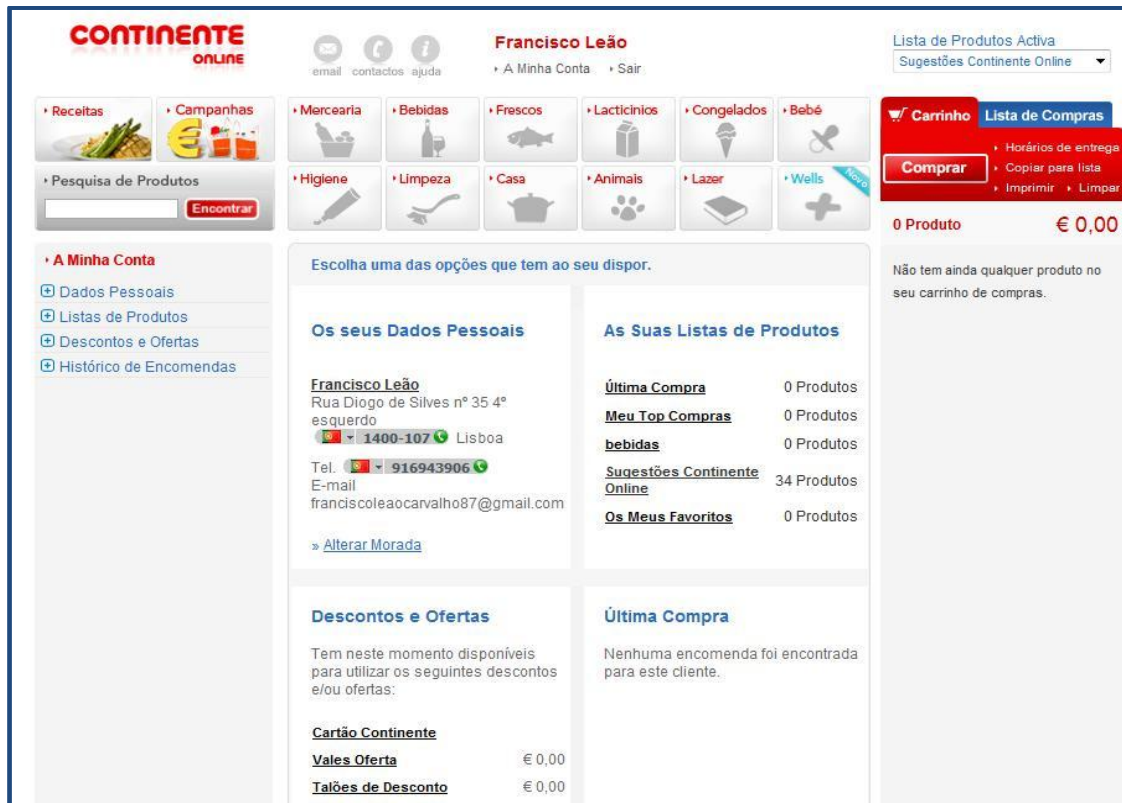


Figure 4 – My profile



Appendix 10 - Transcript of the first online survey

Questionário sobre o Sector de Retalho Alimentar

1.Frequência & Tipo de Compras

1.1 Com que frequência costuma ir aos seguintes supermercados?*

Raramente (Mensalmente); Algumas vezes (Quinzenalmente); Com Frequência (Semanalmente); Com Muita Frequência (Mais que uma vez por semana)

	Nunca	Raramente	Algumas vezes	Com frequência	Com muita frequência
Continente (hipermercado)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Continente Bom Dia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Continente Modelo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pingo Doce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intermarché	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lidl	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MiniPreço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jumbo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outros	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1.2 Quanto gasta em média em cada ida ao supermercado (em euros)?*Indique em relação a todas as marcas (mesmo que a resposta seja 0)

	0	0-20	20-50	50-100	mais de 100
Continente (hipermercado)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Continente Bom Dia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	0	0-20	20-50	50-100	mais de 100
Continente Modelo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pingo Doce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intermarché	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lidl	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MiniPreço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jumbo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outros	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Atributos & Características

2.1 Qual o seu supermercado preferido?*

- ☒ Continente (hipermercado)
- ☐ Continente Bom Dia
- ☐ Continente Modelo
- ☐ Pingo Doce
- ☐ Intermarché
- ☐ Minipreço
- ☐ Jumbo
- ☐ Outros

2.2 Como valoriza as seguintes características quando escolhe o supermercado/hipermercado onde faz as suas compras?*

Classifique cada característica de acordo com a sua importância relativa

	Valorizo muito pouco	Valorizo pouco	Indiferente	Valorizo	Valorizo bastante
Preço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conveniência	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Qualidade dos Produtos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hábito (conheço bem a marca e estou familiarizado com os seus produtos)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoções	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Qualidade dos serviços	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Imagem (confiança relativa à marca)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Variedade de produtos e serviços	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2.3 Que atributo mais associa a cada uma das marcas?*

Escolha o atributo que melhor define cada marca

	Preço Baixos	Qualidade de Produtos e Serviços	Conveniência	Variedade	Promoções
Continente	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Preço Baixos	Qualidade de Produtos e Serviços	Conveniência	Variedade	Promoções
Pingo Doce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intermarché	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lidl	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MiniPreço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jumbo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2.4 Qual a importância para si dos seguintes tipos de serviços?*

	Não utilizo	Utilizaria se o serviço melhorasse (qualidade, preço, etc.)	Utilizo raramente	Utilizo frequentemente	Não conheço
Compras Online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cartão de Desconto	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entrega ao Domicílio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Takeaway (refeição pronto a comer)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aplicação para smartphones	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2.5 Classifique em termos de relevância o peso dos seguintes tipos de produtos nos seus hábitos de consumo no sector alimentar*

Classifique cada tipo de produto de acordo com o peso no seu cabaz de compras

	Muito pouco relevante	Pouco relevante	Indiferente	Relevante	Muito relevante
Produtos em Promoção	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Produtos Nacionais	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Produtos de Marca Branca	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Produtos Gourmet (qualidade superior)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Produtos frescos (frutas, vegetais, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Continente

3.1 - Como obtém informação sobre a marca Continente?*

- ☐ TV
- ☐ Rádio
- ☐ Opiniões de Amigos
- ☐ Folhetos Publicitários
- ☐ Nas lojas Continente
- ☐ Outra:

3.2 Que influência tem a publicidade do Continente nas suas escolhas?*

- ☐ Nenhuma

- ☐ Pouca
- ☐ Alguma
- ☐ Muita

3.3 O que pensa relativamente às seguintes características da marca Continente?

	Discordo Totalmente	Discordo	Concordo	Concordo Totalmente
As lojas são práticas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Existe uma boa relação qualidade/preço dos produtos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As lojas são convenientes (proximidade física)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A marca oferece boas promoções	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Os serviços oferecidos são úteis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A experiência de compra é positiva (conforto)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Existe uma grande variedade de produtos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3.4 Conhece o cartão Continente?

- ☐ Sim
- ☐ Não

3.4.1 Se sim, sabe quais são as suas vantagens?

3.5 Já utilizou o serviço de compras Online Continente?*

- ☐ Sim
- ☐ Não

3.5.1 Se sim, como correu a experiência?

1 2 3 4 5

Muito Mal ☐ ☐ ☐ ☐ ☐ Muito Bem

3.6 De que forma avalia os produtos de marca branca Continente

1 2 3 4 5

Muito negativamente ☐ ☐ ☐ ☐ ☐ Muito positivamente

3.6.1 De uma forma geral como compara os produtos de marca branca Continente com os produtos de marca branca de outros grupos (Como por exemplo do Pingo Doce, Intermarché, etc.)

1 2 3

Negativamente ☐ ☐ ☐ Positivamente

4 - Socio demográficos

4.1 - Idade*

- ☐ 20-29
- ☐ 30-39
- ☐ 40-49
- ☐ 50-59
- ☐ 60 ou mais

4.2 - Sexo*

- ☐ Masculino

- ☐ Feminino

4.3 Rendimento mensal líquido do agregado familiar*

- ☐ Inferior a 500€
- ☐ Entre 500€ e 999€
- ☐ Entre 1000€ e 1499€
- ☐ Entre 1500€ e 1999€
- ☐ Entre 2000 e 2499€
- ☐ Entre 2500€ e 3000€
- ☐ Superior a 3000€

4.4 - Distrito Residencial*

- ☐ Aveiro
- ☐ Beja
- ☐ Braga
- ☐ Bragança
- ☐ Castelo Branco
- ☐ Coimbra
- ☐ Évora
- ☐ Faro
- ☐ Guarda
- ☐ Leiria
- ☐ Lisboa
- ☐ Portalegre
- ☐ Porto
- ☐ Região Autónoma dos Açores
- ☐ Região Autónoma da Madeira
- ☐ Santarém
- ☐ Setúbal
- ☐ Viana do Castelo
- ☐ Vila Real
- ☐ Viseu

4.5 - Nível de escolaridade*

- ☐ Sem escolaridade
- ☐ Primária incompleta
- ☐ Primária completa (4 anos de estudo)
- ☐ 2º Ciclo (6 anos de estudo)
- ☐ 3º Ciclo (9 anos de estudo)
- ☐ Secundário (12 anos de estudo)
- ☐ Ensino superior

4.6 - Situação profissional

- ☐ Estudante
- ☐ Empregado(a)
- ☐ Trabalhador estudante
- ☐ Desempregado(a)
- ☐ Reformado(a)
- ☐ Aposentado(a)

4.7 - Estado civil

- ☐ Solteiro(a)
- ☐ Casado(a)
- ☐ Divorciado(a)
- ☐ Viúvo(a)

4.8 - Número de membros do agregado familiar

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5 ou mais

Appendix 11 - Transcript of the second online survey

Questionário - Compras de supermercado Online

*Obrigatório

1- Com que frequência utiliza internet no seu dia-a-dia?*

- ☐ Muito raramente
- ☐ Com pouca frequência
- ☐ Com frequência
- ☐ Com muita frequência

2 - Compra algum tipo de produto através da internet?*

- ☐ Nunca
- ☐ Sim, ocasionalmente
- ☐ Sim, com frequência

3 - Caso a resposta à pergunta anterior tenha sido positiva, qual o tipo de produto que mais compra Online?

- ☐ Livros
- ☐ Bilhetes de avião
- ☐ Bilhetes para concertos
- ☐ Produtos de informática
- ☐ Produtos de saúde e beleza
- ☐ Outros

4 - Caso a resposta à pergunta 2 tenha sido positiva, que tipo de media utiliza para obter informação antes de uma compra online?

- ☐ Website onde o produto é vendido
- ☐ Blogs
- ☐ Redes sociais
- ☐ TV
- ☐ Radio
- ☐ Outros

5 - Indique os 3 sites que mais visita*

6 - Considerando os seguintes horários, em qual utiliza internet com maior frequência? *

- ☐ 08:00-12:00
- ☐ 12:00-16:00
- ☐ 16:00-20:00
- ☐ 20:00- 24:00

7 - Quais as duas estações de rádio que mais costuma ouvir?

8 - Considerando os seguintes horários, em qual ouve rádio com maior frequência?

- ☐ 08:00-12:00
- ☐ 12:00-16:00
- ☐ 16:00-20:00
- ☐ 20:00-24:00

9 - Indique os 3 canais de TV que mais assiste

10 - Considerando os seguintes horários, em qual assiste TV com maior frequência?*

- ☐ 08:00-12.00
- ☐ 12:00-16:00
- ☐ 16:00-20:00
- ☐ 20:00-24:00

11 - Que transporte utiliza para se deslocar para o trabalho (ou faculdade)?

- ☐ Carro
- ☐ Autocarro
- ☐ Comboio
- ☐ Metro
- ☐ Outro

12 - Conhece o serviço de compras Online do Continente?*

- ☐ Sim
- ☐ Não

13 - Já utilizou a loja Online do Continente?*

- ☐ Sim
- ☐ Não

14 - Caso já tenha utilizado a loja online do Continente, como considera ter sido a experiência de compra?

- ☐ Prática
- ☐ Confusa
- ☐ Eficaz
- ☐ Pouco intuitiva
- ☐ Agradável
- ☐ Conveniente

15 - Já alguma vez utilizou a internet para efetuar compras de supermercado?*

- ☐ Sim
- ☐ Não

16 - Se a resposta à pergunta anterior foi negativa, qual considera ser a principal barreira que o leva a não realizar compras de supermercado através da internet?

- ☐ Processo de compra pouco intuitivo (sites confusos)
- ☐ Desconfiança na seleção de alguns produtos por parte da loja (ex produtos frescos)
- ☐ Taxas de entrega elevadas
- ☐ Horários de entrega
- ☐ Sistema de devoluções

17 - Na sua opinião qual é a principal vantagem oferecida pelo serviço de compras de supermercado online?*

- ☐ Permite uma compra mais racional

- ☐ Possibilita uma maior atenção a oportunidades e promoções
- ☐ Serviço mais personalizado
- ☐ Permite poupar em custos de transporte
- ☐ Possibilita um processo de compra mais rápido

18 - Qual dos seguintes horários seria preferível para receber uma encomenda de supermercado em sua casa?*

- ☐ 08:00-14:00, durante a semana
- ☐ 14:00-20:00, durante a semana
- ☐ 20:00-23:00, durante a semana
- ☐ 08:00-14:00, aos fins de semana
- ☐ 14:00-20:00, aos fins de semana
- ☐ 20:00-23:00, aos fins de semana

19 - É cliente Continente?*

- ☐ Sim
- ☐ Não

20 - No caso de ser cliente Continente, utiliza o cartão Continente?

- ☐ Sim
- ☐ Não

Factores Socio-demográficos

1 - Idade*

- ☐ 18-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-64

2 - Sexo*

- ☐ Feminino
- ☐ Masculino

3- Rendimento mensal líquido do agregado familiar (em euros)*

- ☐ Inferior a 500
- ☐ Entre 500 e 999
- ☐ Entre 999 e 1999
- ☐ Entre 1999 e 2999
- ☐ superior a 2999

4 - Estado civil*

- ☐ Solteiro(a)
- ☐ Casado(a)
- ☐ Divorciado(a)
- ☐ Viúvo(a)

5 - Situação profissional *

- ☐ Estudante
- ☐ Empregado(a)
- ☐ Trabalhador estudante
- ☐ Reformado(a)
- ☐ Aposentado(a)

6 - Número de pessoas no agregado familiar*

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5 ou mais

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